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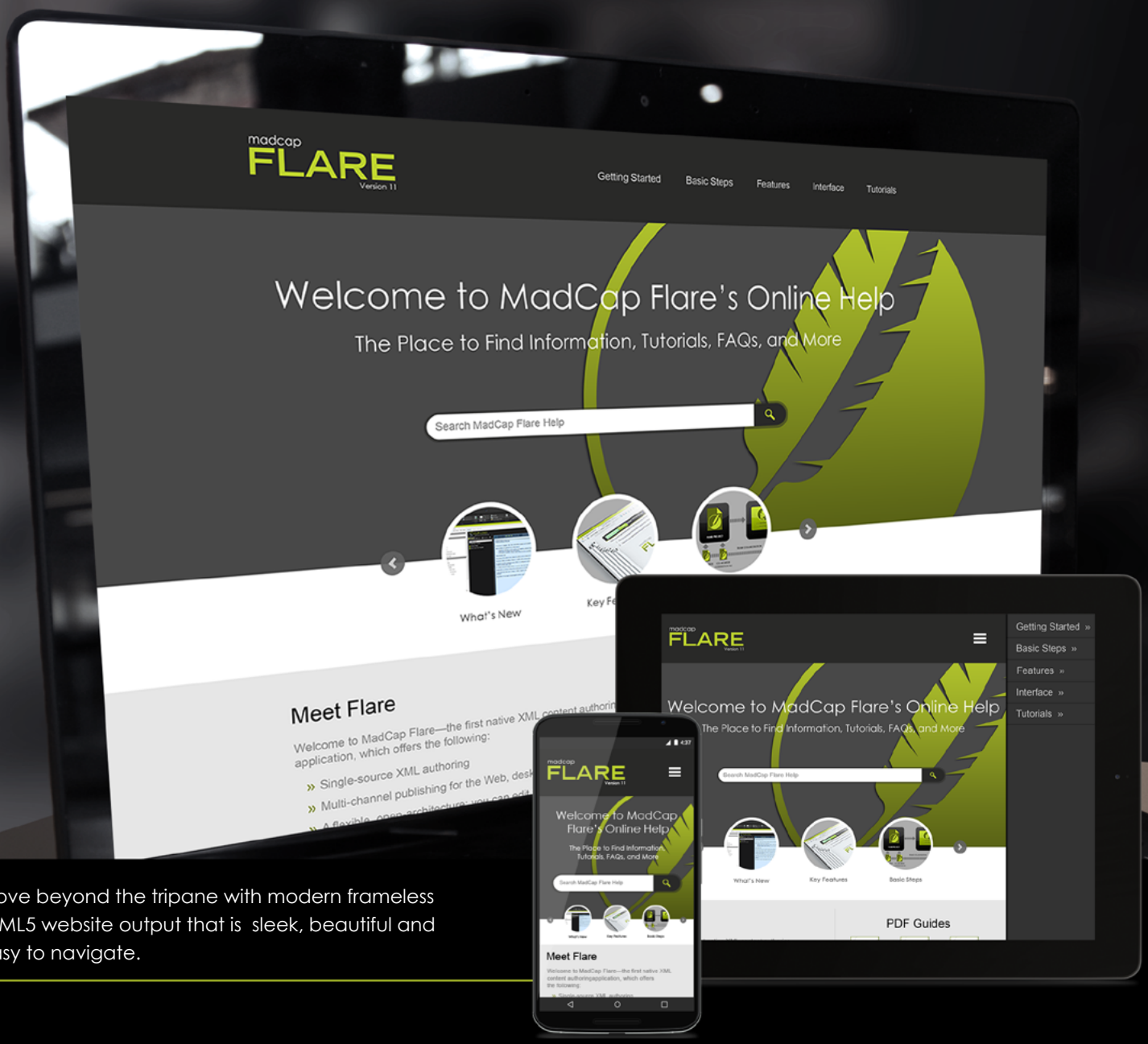

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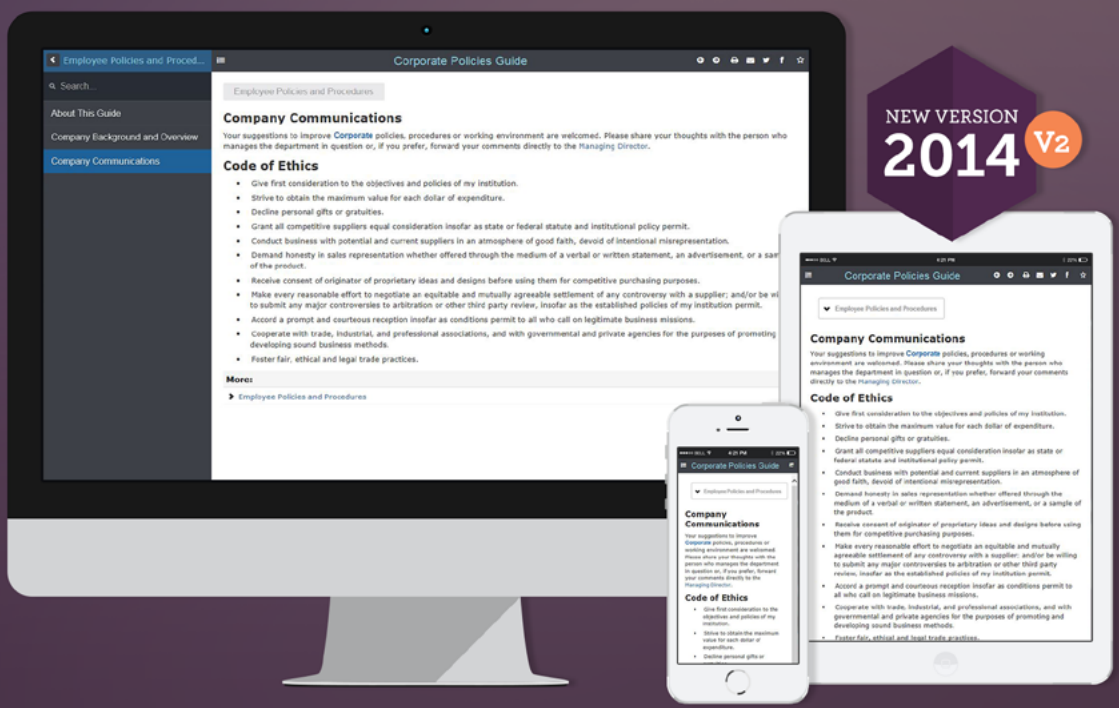

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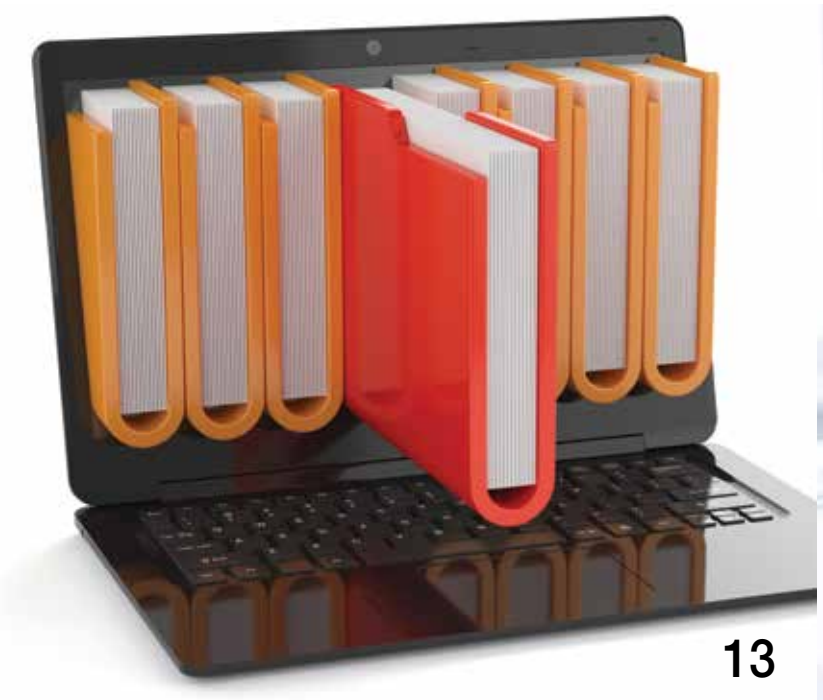

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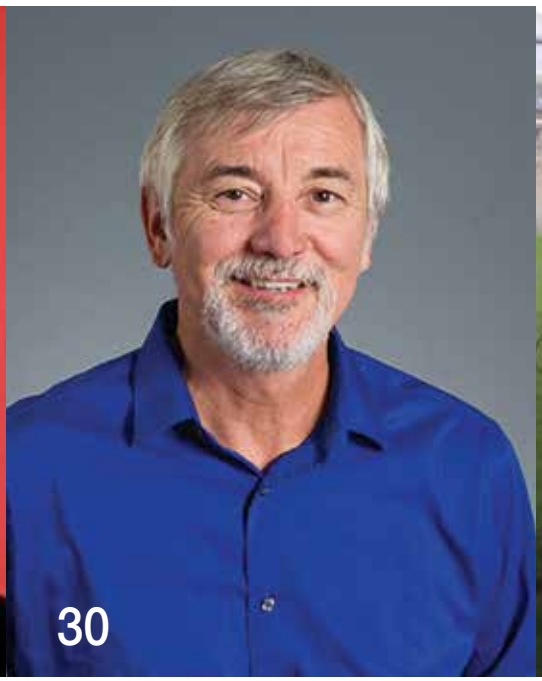

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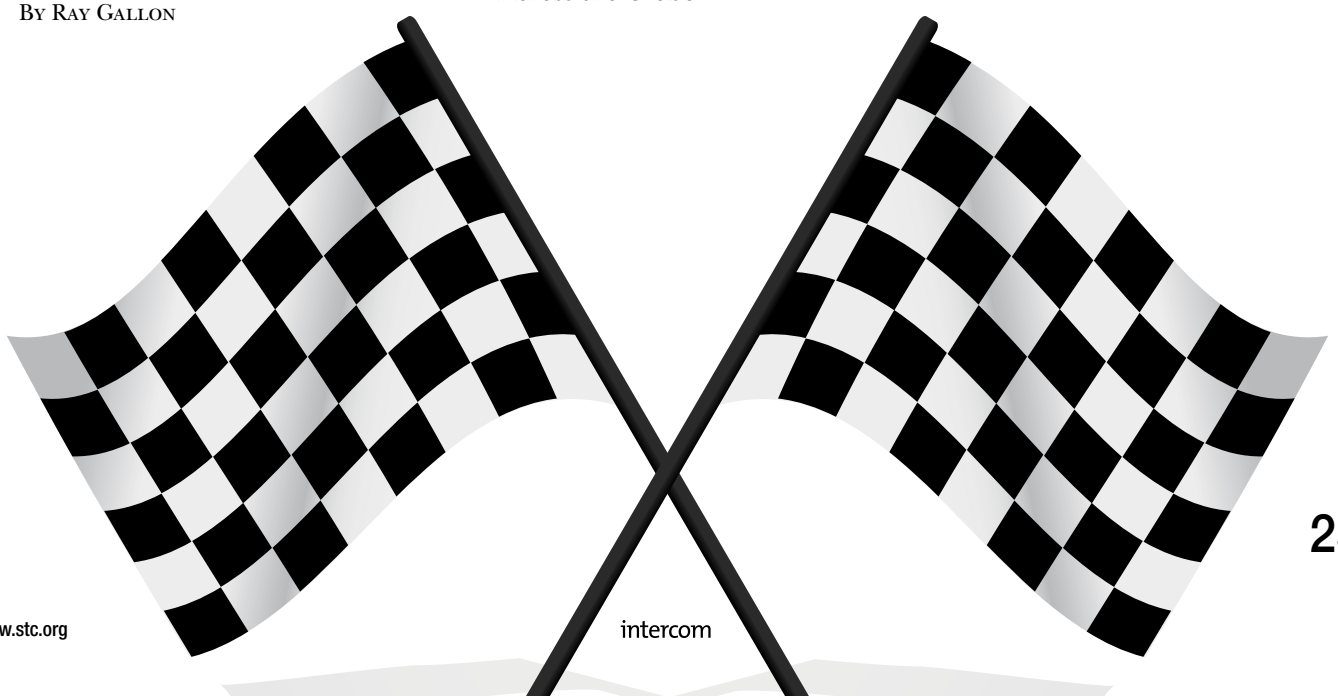

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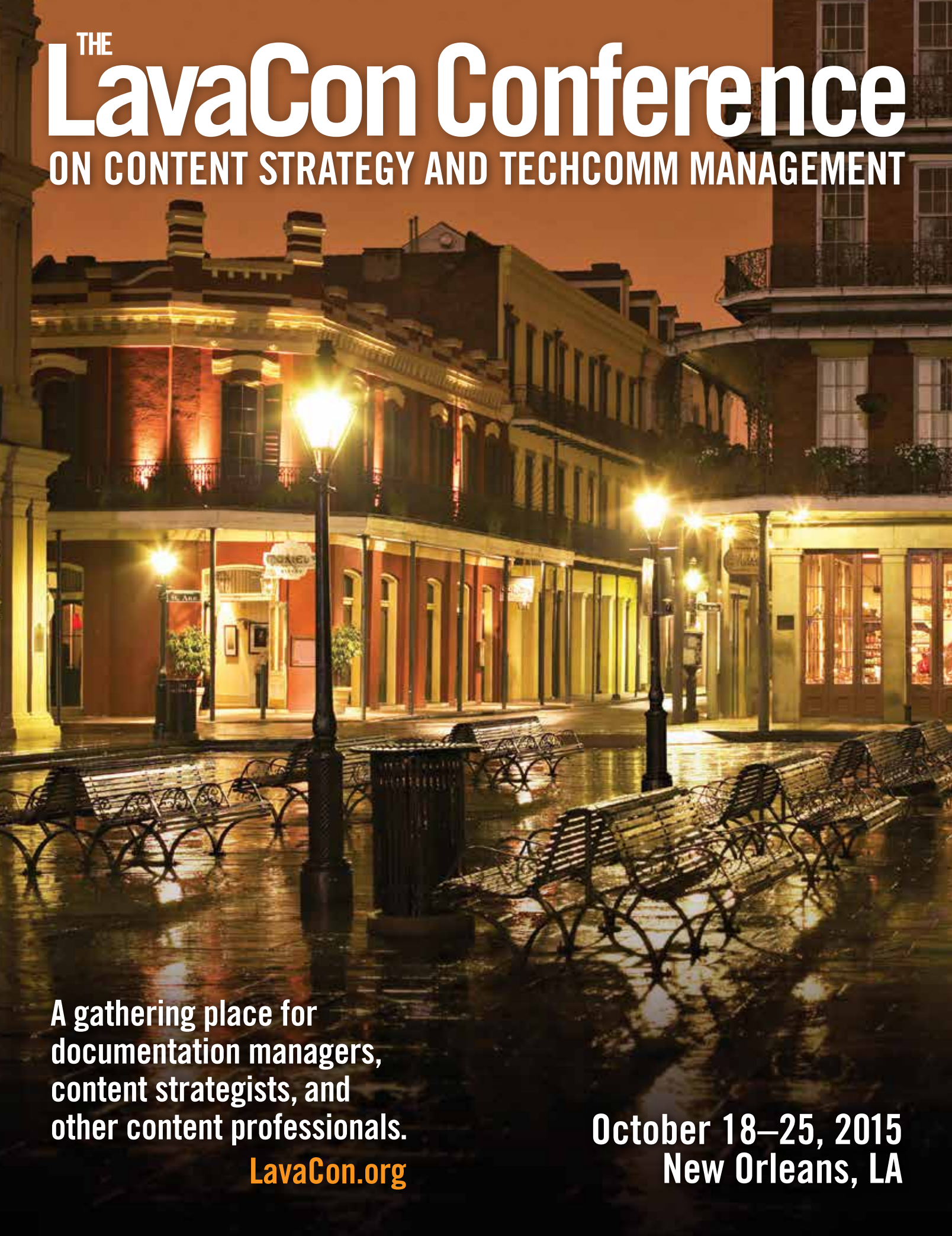
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A Note from the Editor

THIS ISSUE OF *INTERCOM* focuses on writing and editing concepts, particularly curating content in different environments. Three authors in the issue have approached content curation from analogous perspectives—writing for engineers, writing for content reuse, and writing for clinical trials—but their environments differ greatly.

Because many technical writers work with engineers in the workplace, Bradford Connatser has written an article about the many challenges in helping engineers improve their writing by teaching good writing habits and "unteaching" or helping them to unlearn bad ones. Johanne Lavallée from Quebec, Canada, explains how a technical communicator's best skill—organizing—can be used to successfully complete a content reuse project that considers feasibility, needs, costs, and other variables. And Pankaja Kulabkar analyzes the writing of a clinical trial document for Type 2 diabetes in India.

I extend gratitude to Adobe for sponsoring the July/August issue of *Intercom*. Adobe expert Jang Graat has written a first-hand review of the new release of FrameMaker 2015, along with descriptions of the software's best features. This issue also marks the launch of a new column by Ray Gallon on standards, a guru interview by Scott Abel of Dr. Robert Glushko, and a student perspective by Kirk St.Amant's guest columnist Adam Fout.

Did you attend the STC Summit or have you been to an interesting conference this year where your ideas were sparked? Consider writing an article for *Intercom* on an upcoming topic! October is the "Social Issue," focusing on topics such as building networks and social business strategies, how companies deliver content through social media, community-driven content, new roles in the social landscape for technical communicators, volunteering and mentoring via social activities, how social activities advance your business, and social marketing. The December issue of *Intercom* is dedicated to the "State of the Industry," and I am soliciting articles on the bellwethers of the profession, the state of the discipline, and intersections with related fields (such as academia, usability, medical, information architecture, usability and UX, and information development). I hope I hear from you!

—Liz Pohland
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Teaching and Unteaching Engineers to

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Write in the Workplace:

An Editor's Perspective

By BRADFORD R. CONNATSER | *Senior Member*

I WORK WITH ENGINEERS, mostly electrical engineers, to ready their documents for publication. Many technical communicators work with engineers, translating their chewy prose into something more easily digestible. During his keynote address at Adobe Day during the STC Summit in Phoenix (18 May 2014), Senior Adobe Product Manager Kapil Verma revealed a sobering statistic: 76% of technical communicators report that they work with engineers. And those of us who work with engineers know that developing excellent communication skills takes a backseat to mastering engineering during their formative education.

Teaching engineers best practices in technical communication and unteaching their worst ones in the workplace can be a challenge for professional communicators. Reversing the entrenched, adverse writing habits of engineers may take more than marginal comments in a Word document. This article describes ways in which you can help to improve their documents through solid technical communication, from subtle suggestions to full-out group training.

Note that when I say, "Engineers do this" or "Engineers do that," I mean engineers where I work and whom I have encountered, in general. You can substitute *subject-matter expert* for the term *engineer*, but there may be substantive differences between an engineer and, say, a chemist or a banker.

Leveraging a Philosophy of Technical Communication

As technical communicators, we try to understand the needs of the reader. We ask authors pointed questions, such as, "Who is your intended audience? Can you characterize your readers? What do you want them to get out of this? Do you want them 'to learn,' 'to do,' 'to learn to do'?" But do we really understand the concept of *the reader*? Do we really know how documents communicate ideas from one brain to another?

Many of us simply do not have time to develop a robust philosophy of technical communication that includes all of the actors involved in the process. Over my 23 years as a professional editor, I have developed a philosophical bumper sticker that helps keep me grounded: *Write for the reader.* It reminds me that reading creates a dynamic relationship between the reader and a fictional version of the actual author, which Wayne Booth calls the *implied author* (consult Booth's *The Rhetoric of Fiction* or Roland Barthes' essay "The Death of the Author" for more details). The implied author *talks* to the reader, and the reader *hears* the content of the document through the voice of the implied author. Each reader, reading at a steady pace (not too slow, not too fast), synthesizes the voice of the implied author to create a unique meaning.

The *talking* that goes on during silent reading—sometimes called *speech encoding*—is essential to the process of fluid reading. This process happens "automagically," without the intentions of the reader or the designs of the author. It just happens. Which means that conscientious, courteous writers have to account for what their readers *hear,* for what their readers *say.* Then, actual authors will likely create accessible, coherent implied authors and become reliable narrators of their stories.

If you make engineers sensitive to their audiences, then you give them impetus to accommodate entrenched behaviors of their readers, which is another way of saying that you give them a reason to improve their prose. Second, if you cause engineers to understand the reading process at least to some degree, then they can attach rationale to your recommendations to them—*that* constitutes *teaching.*

Opportunistic lessons may be very small, but they can also be very powerful. As you mete out micro-lessons over time, you inculcate a reader-centric philosophy into the brains of engineers. And because they are intelligent, this works.

Some of the lessons teach, but others unteach, such as teaching an engineer to *not* put two spaces between sentences. You can provide technical reasons for unteaching what engineers have been taught, but the greatest reason of all is the reader, who may know the correct rule and abruptly become the enforcer of it, clucking over the author's prose. So, your marginal lesson might take the form of: "One space has become the law of the land for formal publications, and style manuals with enormous clout insist upon it. Your readers may know this rule and become distracted from what is otherwise an effective composition. Please don't give your readers ammunition to shoot down your message." Notice that in this fictional micro-lesson, I included the term *your readers* twice. It's that important.

Now, here is a challenge. When you base a lesson on your personal philosophy of technical communication, and the conclusion of your lesson is in controversy, how do you convey your advice? Gently, I suggest. For example, in electrical engineering, whether or not to capitalize *AC* when abbreviating *alternating current* is an example of a style in controversy, and resolutely insisting on doing one or the other may place the engineer in a battle he would rather not fight. If the engineer expresses incredulity about your recommendation, encourage him to Google the controversy, enabling the engineer to perceive two things: first, that there is a constellation of people who care about such things, and second, that the engineer is in full sovereignty of his linguistic destiny on the matter.

A Case Study: Four Ways to Teach and Unteach

The many ways to teach and unteach engineers to write better prose range from the conspicuous—such as conducting formal courses endorsed by your employer—to what I call *stealth education,* which is an attempt to impart knowledge to engineers without being conspicuous. What follows are four ways to educate engineers, and they cover the complete spectrum of intervention, from the full-on single- or multi-day courses to subliminal suggestions. Each may not fully apply to your situation, but perhaps you can glean some pointers and modify them to work for you.

1. Compose a Formal Course or Presentation on Effective Technical Writing

Here are the steps I took to develop and implement a course on technical writing for engineers after getting buy-in from management. The ideal situation in which to teach engineers best practices in technical communication (and unteach their worst ones) is to have a captive but engaged audience, where you control the discourse but enable the students to express confusion or frustration with a principle and perhaps participate in exercises.

Prepare Your Materials

- As you edit content you receive from engineers, raise your antennas to detect common impediments to fluid reading and potential causes of misreading. For example, identify the damaging inertia of tradition and "superstitions" (such as double-spacing between sentences). What constitutes a superstition in writing? According to *dictionary.com*, a superstition is "a belief or notion, not based on reason or knowledge, in or of the ominous significance of a particular thing, circumstance, occurrence, proceeding, or the like." As Stevie Wonder says, superstition is "when you believe in things that you don't understand." When engineers adhere to rules that modern editors dismiss as invalid, those superstitions should be recorded and addressed during training.
- Acquire meaningful real-world examples. Use the good stuff that engineers write as well as the not-so-good. Harvesting their good writing practices and disseminating them to others are beneficial to education.
- Research, explore, and experiment (surreptitiously if necessary) to test your observations. For example, in 2003, I conducted an experiment using engineers as my subjects. My hypothesis was that the putative rule for harmonizing a parameter value and its unit of measurement was faulty: that is, "Use the singular unit

of measurement for values between 1 and -1, inclusive." Based on the experiment, I discovered that the intuitive rule is different (namely, "Use the singular only for the number 1—not zero, not negative 1, not 0.1, or any other number"). This result was published in *Technical Communication*, which added clout to my encouraging engineers to use this "new" rule (see "Reconsidering Some Prescriptive Rules of Grammar and Composition" in *Technical Communication*, May 2004).

- Outline, annotate, prioritize, and pace your lessons. Don't try to fill their brains in a single course. Marathon sessions are not productive, and a two- or three-day courses may require more time than engineers have to devote to post-grad education. Allowing time for them to reflect and apply what they have learned incrementally is essential to the desired outcome of education in the workplace.

Teach and Unteach in a Formal Setting

- Introduce engineers to their readers. I do this with a top 10 list, such as "Top 10 Things You Didn't Know That Your Readers Do." Once you demonstrate how complex the reading process is, engineers are more likely to make adjustments to their writing to accommodate readers.
- Hit the biggest offences early and provide many real examples harvested from their own writing. You may be tempted to create examples, but fabrications are not as powerful and relevant as real-world ones.
- Integrate live exercises into your course. For example, noun strings are indigenous to the writing of engineers. During formal training, I present engineers with many examples of noun strings and ask them to repair them by using a three-step process: Identify it, determine the meaning and relationships between the words in the string, and re-compose the words using connective tissue (mostly prepositions), which typically results in re-arranging the words.
- Integrate enabling technology into your course. During exercises, I project the monitors of the students onto the screen to show the class how effective revision can be accomplished in several ways. I also use explanatory animations to visualize reading processes.
- Handle resistance to change sensitively and with compassion. Asking engineers to consider old rules in new ways can engender confusion and incredulity. Concrete examples help engineers reconsider errant writing practices that persist due to assumed efficacy ("superstition"). There are many ways to introduce engineers to new ways of doing things, but I'll limit the list to three.

1. **Trace Changes in Usage**
   The word *putative* is used to describe a consensus of usage, such as the putative spelling of a word. However, when spellings are in controversy, how can we prove that our recommended spelling is the right one? Ngram has come to my rescue on several occasions. Engineers love charts and graphs, and ngrams serve as clarifying narratives about the competition between two or more words or phrases. At *books.google.com/ngrams*, you can visualize how word usage changes over a vast time (decades or even centuries) and fortify your position on prevailing usage. Encourage engineers to conform to the latest forms or trends. For example, consider how some phrases evolve from open forms, to hyphenated forms, to closed forms. The ngram in Figure 1 illustrates how *health* and *care* have been represented as a unified concept: open, hyphenated, and closed, and while the open form still prevails, its usage is in decline, while the trend for the closed form continues to rise.

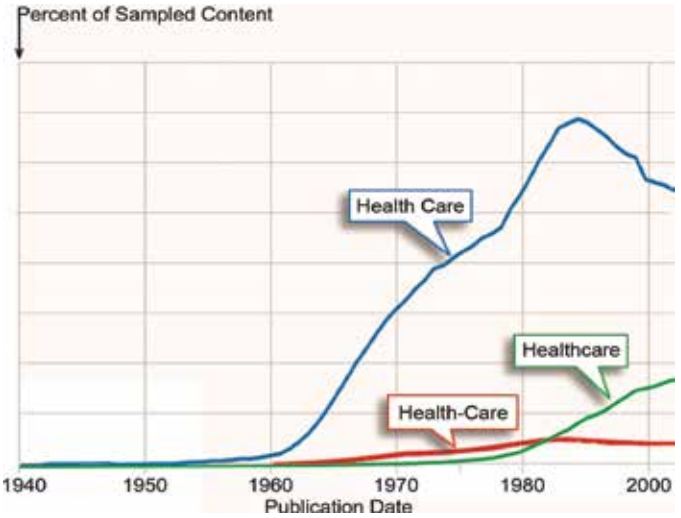

Figure 1. Ngram of "health" and "care."

The slow but certain evolution of some irregular verbs to regular (inflected) verb forms is another trend supported by ngrams. For example, consider the past tense of *burn* in the ngram in Figure 2. Some people hang on to the obsolete form (*burnt*), and showing them the ngram below clearly demonstrates prevailing usage.

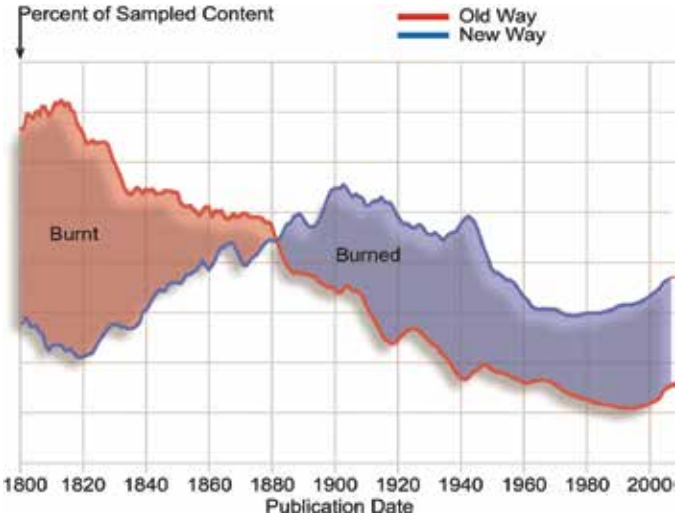

Figure 2. Ngram of "burnt" and "burned."

The haphazard Anglicizing of some irregular Latin and Greek plural forms also causes confusion and inconsistency among engineers. *Antennas* is supplanting *antennae,* but *indices, spectra,* and *appendices* endure, as shown in Figure 3, remaining the putative plural spelling. Sometimes, the old way gets its way.

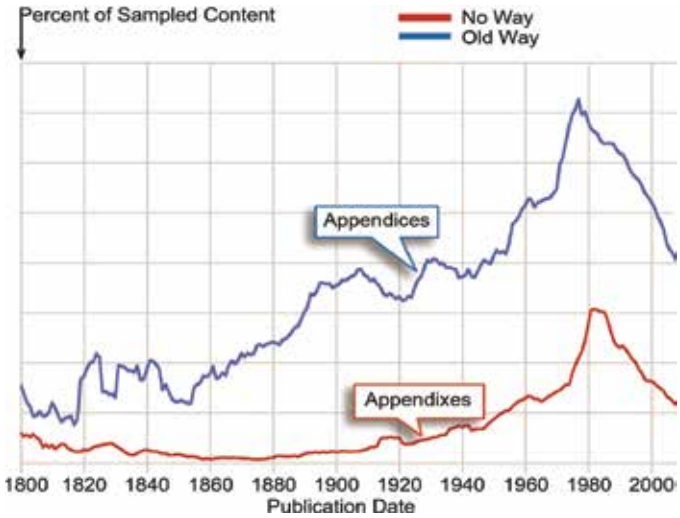

Figure 3. Ngram of "appendicies" and "appendixes."

2. **Introduce the Concept of "Two Grammars"** "That's not what I was taught." I've heard this sentence several times. It reveals the tensions between synthetic grammar (also called *normative* or *prescriptive grammar*) and organic grammar (also called *intuitive grammar*). On occasion, these two grammars fight one another. I introduce the concept of *notional accord* to engineers to clarify these tensions. For example, many grammar mavens would agree that when you use *none* as a subject, the verb should be singular, as in, "None of the steel was compromised." However, the prepositional phrase that always follows *none* bears upon the subject/verb agreement in notional accord. "None of the people was injured" may conform to the prescriptive rule "*none* takes a singular verb," but it violates notional accord (intuitive grammar). What is the notion of *none* in its context? Is it singular, as in *steel,* or plural, as in *people*? Explaining to engineers that rules come from two distinct sources—one from DNA and one from the classroom—and encouraging them to weigh their rhetorical and grammatical choices in favor of the reader will help them craft better, more reader-centric prose.
3. **Recognize That Engineers Are Expert Communicators** Engineers are not *professional* communicators by education and practice. They must write as *part* of their profession, and this part of their duties is often an afterthought. However, engineers are experts in communicating their ideas. They do it successfully day-in, day-out—on the phone, in an email or text message, through social media, or face to face. But formal expository writing raises the bar immensely. In a technical report or an instruction manual, formality and correctness prevail, based on the reader's expectations of correct, clear, thoughtful prose. Editors should make a sincere effort to avoid condescending to engineers *because* they *are* successful in their conveyance of ideas to their peers and clients. We are here to "simply" help them when it comes time to declare and publish those ideas in formal communication genre.
   - Establish an open-door policy by inviting engineers to come to you for questions. Act on any interest in technical communication that an engineer expresses by immediately engaging him and, if appropriate, suspending the conversation until you are prepared to inform the inquisitor with research that you have conducted during the interim. When engineers are reluctant to do things differently, the *why* becomes an essential component of successful education.

2. Provide On-Grid Sporadic Education

My favorite way to provide sporadic education is to send an email to engineers asking them for their opinion on a linguistic question, which sometimes spawns an enlightening discussion. I refer to this as "in-reach"—reaching in to the engineers within my organization and initiating dialogues about writing. Using your internal email, you can send observations and tips to people whom you know to be interested in improving their writing skills—as you encounter problems that become opportunities for teachable moments.

Sometimes an engineer drops by my office or invites me into his office to ask a simple question. I use these opportunities to broaden the question and transform it into a lesson. For engineers at the beginnings of their careers, this type of sporadic education can take the form of mentoring. Mentoring young engineers to improve their writing is to go out of your way to speak to them without pressure. I recently conducted a one-hour course on technical writing for the Early Career Network at my employer. This was an introduction to the concept of considering the audience and preventing/repairing noun strings. But it was also an introduction to *me* as a resource for *them.*

3. Provide Off-Grid Education

I implement off-grid education by composing and sending tips to an email distribution list of engineers (and other staff) who have expressed an interest in receiving them. Here's how I made it work:

- I purchased a Web domain for a website (*thedocwriter.com*). The domain costs $15 a year, and I host it using a Web-hosting service that I'm already paying for.

- I created a website to present the tips. I decided to store my tips in a Microsoft Access database, with each record being tagged with things like key terms and categories. Also, I wrote some code to enable visitors to search the database, as well as code to link key terms to a dictionary.
- I send out periodic invitations. Each invitation contains an abbreviated form of the tip itself, and my tips are always progressive, from a title, to the abbreviated tip, to the tip in full, and then finally to an essay on the subject (in some cases). Invitees can bail on the tip at any stage, preventing them from wasting time on subjects with which they are already comfortable or items in which they have little interest.

Of course, your implementation of off-grid education does not have to be so time-consuming. You can simply build a distribution list and pitch out tips *ad hoc*.

4. Provide "Stealth" Education During Review and Editing Cycles

Through stealth education, I find opportunities to slip in pithy, relevant lessons about technical writing, usually in the margins of a Microsoft Word document that I'm editing. Sure, you can change *since* to *because*, but will the engineer learn from that edit without your guiding comments? Why not embed a micro-lesson in subordinating conjunctions? Perhaps point the author to your tip site.

Sometimes, the engineer will get the lesson from repeated corrections. For example, one engineer had a habit of placing his transitional conjunctive adverbs (such as *however* and *therefore*) in the middle or at the end of his sentences instead of at the beginning where they belong, often interceding between the subject and its verb or the verb and its object. I made several dozen changes to these intercessory conjunctions, without comment, and his next report was resplendent, with his conjunctive adverbs taking their proper positions within his sentences.

The little lessons in the margins build momentum for the big lessons in more robust channels, such as training courses and communication tips. But editors and engineers alike are in a hustle to get documents delivered on time. The danger in crafting terse lessons in haste is accidental condescension or hurtful "discoveries" of an engineer's linguistic inadequacies. In other words, when implementing stealth education, be aware of the author's ego.

If you believe in a rule, own it, defend it. Otherwise, confess your uncertainty in terms that at least reveal thoughtfulness.

Negotiating Difficulties

The proper metaphor for continuing education is not a superhighway to knowledge but a winding road that requires vigilance and caution. There are several difficulties related to teaching and unteaching engineers to write, but here I'll limit the discussion to three: dealing with a "big pencil," establishing authority, and managing plagiarism.

Dealing with a "Big Pencil"

Sometimes I deal with engineers who are proud of their writing skills but have not been formally trained in technical communication and therefore do not understand the nuances of best writing practices. I call these engineers "big pencils" because they have and sometimes exercise veto power over my edits. They generally are superior writers and make an editor's first pass easy. However, they tend to reject edits as superfluous or inconsequential. Relentless iterations to reach a compromise are sometimes futile, and an editor may lose a big pencil as a client if he or she is not treated with respect.

Editors must be sensitive to the psychologies of big pencils. When commenting, try to be modest and gentle. Remember that the stigma of red editorial marks haunt many engineers, so consider changing the color of your changes and comments to blue or another hue.

Establishing Authority, Dealing with Resistance, and Taking It Easy

Your credentials—no matter how impressive—do not automatically confer authority to you in the discipline of technical communication. Earning a reputation for good work over time will, in theory, establish your authority on the subject. Still, some engineers will resist your recommendations to improve their documents, and some will strive to compete with you, and in the aftermath of any competition, there are winners and there are losers.

For me, "competition" or "subordination" is an unacceptable way to frame a relationship between a subject-matter expert and editor. To achieve parity in an engineer/editor relationship, you have to continually find new ways to improve the writing of engineers as painlessly as possible and delicately explain the reasons for following effective rules. But when you meet with stark resistance, turn the other cheek. When an engineer indignantly revolted against my relentless hyphenation of unit modifiers, I dutifully repeated the renowned quote in the Oxford University Press style manual attributed to its editor, John Benbow: "If you take hyphens seriously, you will surely go mad." So giving in is not necessarily giving up. Conceding the imperfections in our rules of grammar and mechanics may open the door for respect.

What makes good teachers (as well as good people) applies here: compassion, kindness, empathy, even tenderness, if you can conjure these under the pressure of your deadlines and the day's frustrations. Egos are often the

sacrificial parts of the review and editing cycles. Like brake pads on your car, they wear down with normal operation. Wearing down egos to bare metal simply turns the engineer away from you. To get respect, you have to give it.

Of course, you can always shrug and say, "I didn't make the rules," which works as a kind of salve for the chafing sores that sometimes erupt between author and editor, but that does not instill confidence in your authority. If you believe in a rule, own it, defend it. Otherwise, confess your uncertainty in terms that at least reveal thoughtfulness. But if you wallow in ignorance, you may become a victim of low expectations.

Managing Plagiarism

Plagiarism, especially self-plagiarism (also called *reuse* or *repurposing*), can be a difficult concept to grasp. When John, an engineer at Acme Engineering Services, is hired to write a document for Sigma Electrical Research Corporation, the resulting document belongs to Sigma. Yet the words are *his,* and he feels a sense of ownership, an innate entitlement to reuse them at will. This is called *self-plagiarism,* and it is not an exception to the common prohibition against ordinary plagiarism. In fact, this form of plagiarism is more insidious than ordinary plagiarism because it is so misunderstood, but it is just as likely to result in copyright infringement as the ordinary kind.

Not all "borrowed" words in a document constitute plagiarism. Properly cited sources of material are in fact necessary for advancing scholarship in a given field. But when an author lifts material from another document and presents it as his original thoughts, then not only does he engender scandal, but he also risks censure from his employer and the scientific community to which he belongs.

What is a company to do about this? Third-party software can help by objectifying plagiarism for engineers, definitively showing them sources of unoriginal content that appears in their documents (which may or may not be properly cited). One such program, iThenticate, enables anyone with an account to upload a document and receive a "similarity index," which is the percentage of content that can be found in other sources of materials that have been collected in a database (called *CrossCheck*) or that exist on the Internet. Once engineers have experienced a high similarity index, the specter of future high similarity indices from third-party software should motivate them to curb the outsourcing in their prose.

Because plagiarism can be accidental, its discovery is not necessarily an indictment of the engineer but an indictment of the document, which can be exonerated or repaired with discretion. False positives can be swiftly dismissed, but when you discover true plagiarism, clearly explain the offence and offer ways to correct it, such as using proper citation and introduction of "borrowed" content.

Another benefit of teaching is growing your own skills. Putting yourself on the line as an authority encourages you to learn and master your trade at a high level.

Conclusion

When engineers graduate from the academy, their once-elastic notions of expository writing get locked in amber, and it's up to technical communicators to drill in, like the pseudo-science in Jurassic Park, and re-animate that organic matter, preparing it for new ideas about what constitutes a good sentence. As university engineering programs graduate bright-eyed students into the real world, I keep seeing the same mistakes in linguistic craftsmanship, despite their high intelligence. If academia will not remedy this problem, then who will?

All of the efforts described in this article to teach and unteach engineers may seem like a lot of bother. And they are. So why do it? Why teach in the workplace when the tangible professional rewards (such as awards, promotions, and raises) are elusive? First, because you can provide insight into the writing process, the resulting improvements in communication make the author look good, make your employer look good, and ease your job. Another benefit of teaching is growing your own skills. Putting yourself on the line as an authority encourages you to learn and master your trade at a high level. Finally, it's simply satisfying to help engineers succeed by expanding their linguistic knowledge beyond mundane rules of English composition, enabling them to take a more thoughtful approach to their writing chores.

By teaching and unteaching engineers, my purpose is to improve the quality of the documents that engineers abundantly produce. This relentless stream of documents, in fact, is the linchpin of ongoing research at the core of my employer's mission. To help keep the flow of high-quality information going, teaching and unteaching engineers to write is a warranted (if not lauded) endeavor that we technical communicators should proudly own.

Acknowledgment

The author thanks ace editor John Webb for his indispensible and transformative review of this article.

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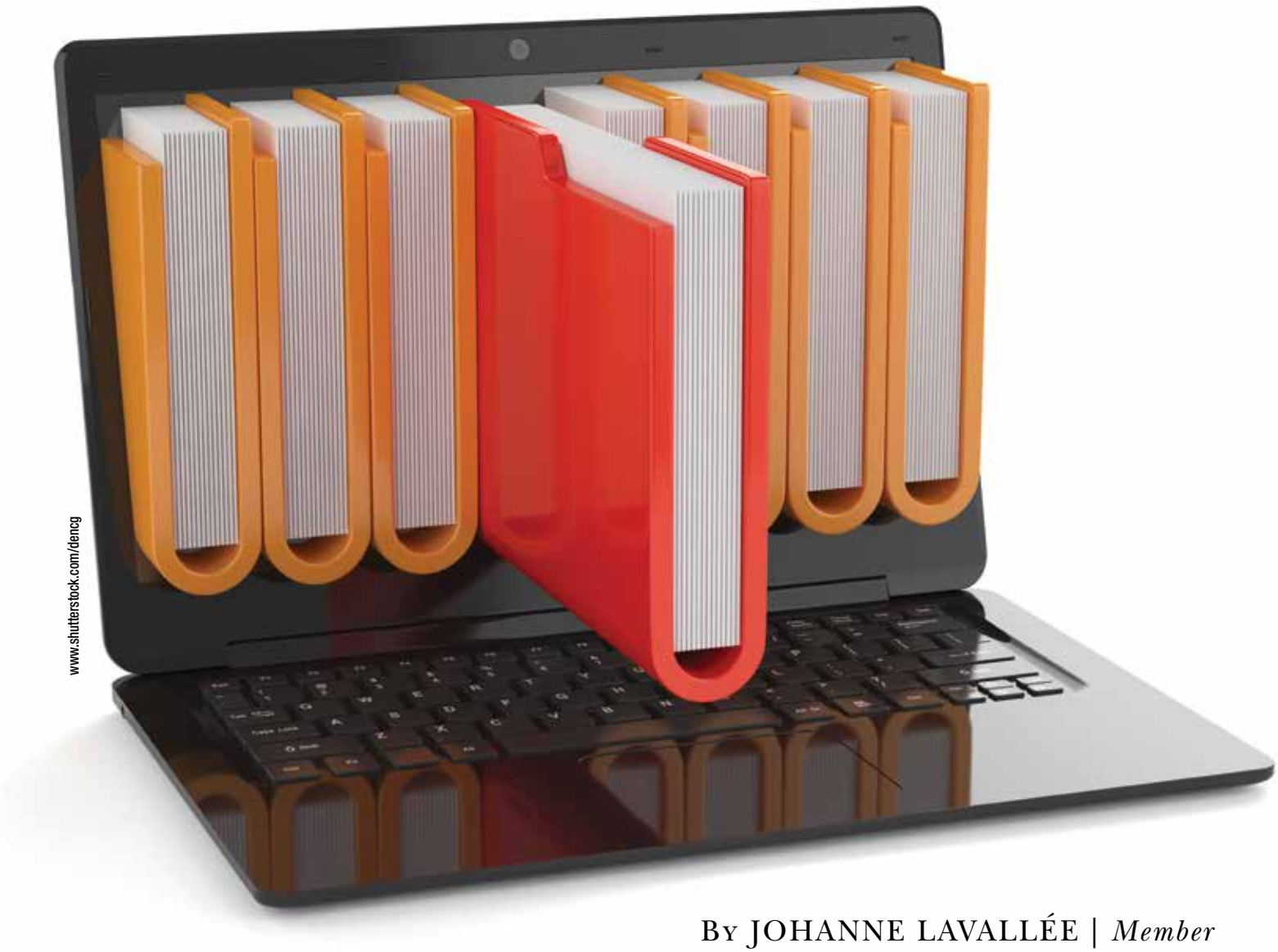
Organize the Organizers



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By JOHANNE LAVALLÉE | *Member*

What Happens Beyond a Content Audit?

Most technical communicators are organizers; we write procedures. Content reuse, when proposed, is often something we greet with a sincere *carpe diem*!

But how do you establish a content reuse strategy? You might now have the support from management to research a solution. You might be working on your business plan. You will need to know many things:

- What is reusable in your content?
- What is it going to cost?
- How long will it take?
- How will you do this?
- How will you build the reuse mosaic?

What's the Magic Number that Makes Reuse Worth It?

It is very difficult to answer this question for one simple reason: once reuse begins, it keeps rising as you become familiar with content-based writing. It also depends on whether you are already in a structured world with conditional text and variables, such as in FrameMaker or Flare.

In Mark Lewis's *DITA Metrics 101* book, a standard topic is shown as an example to be 4.5 to 5.5 hours to write, whereas the same reusable topic takes around 8 hours. That's a 30% difference, but if you are covering three models with that topic, because you insert a variable that changes according to models, it costs 60% less (8 hours compared to 3 x 5 hours). Table 1 illustrates a product guide created with or without reusable topics.

	# of topics	Cost per topic (hrs.)	% reuse	Without DITS (hrs.)	With DITA (hrs.)	Savings (hrs.)
Task	65	5	50	325.0	162.5	162.5
Concept	25	3	90	75.0	7.5	67.5
Reference	10	4	25	40.0	30.0	10.0
Product 1	100			440.0		
Products 2 & 3	200			880.0	400.0	
Suite Totals (3 Products)				1,320.0	840.0	480.0

Table 1. Example product guide with vs. without DITA (Lewis 2012).

Organize Costs

Several costs will help you determine if content reuse is worth it. The following costs should be reduced with reuse:

- **Cost of content creation**—What is your balance between creation and reuse? As mentioned earlier, reuse will weigh heavier as time passes.
- **Cost of content analysis and inventory**—Content analysis is paramount for DITA, and other methods will also require at least some mind mapping.
- **Cost of review and project management**—Review costs drop when you have one master and review several products at once. The same goes for project management after the learning curve, which consists basically in getting used to see all your product main parts as puzzle pieces.
- **Cost of content maintenance**—Using masters and reusing topics significantly reduces maintenance costs.
- **Cost of translation**—Translation expenses drop as much as the reuse percentage.

There are also two new costs that you will need to compare with the expected costs reduction.

- **Cost of converting legacy content to DITA**—A task that you could assign to an intern.
- **Cost of filtering and publishing**—For DITA adopters, this task is often turned over to consultants to save time.

Organize Needs

If you are in Word and only need print and PDF files, staying in Word eliminates these two new costs. Interesting solutions such as SmartDocs allow for the smallest learning curve, especially if your team requires interdisciplinary teamwork. There is no conversion time, chunks of text to be reused are mixed in standard Word content, and no new software needs to be added. Multi-channelling is possible with WebWorks ePublisher, which is compatible with everything.

The most important thing is to take the time to think, plan, and realize there will be trials and errors. Do not switch to DITA just because everybody else is—examine your needs first. This conviction will need to be clear when it's time to teach your team and convince them. Your motivation will convince your expressive individuals and your facts will convince the analytical ones.

If you are using structured FrameMaker, with variables and conditions, chapters, TOC files, and such, you are already optimized. It's multi-channelling that will justify your move, and publishing in multiple formats and to varied audiences—epubs, PDFs, online help for desktop software, help for mobiles, customers in Japan, in Australia, in China—all have their preferences. Multi-channelling is also possible in Word.

Organize Content Audit

One problem with a content audit is generating document lists that can be reused in Excel. We did our first audit with paper and highlighters, not very earth-friendly. Reusable file lists can be generated in DOS, but it is difficult to do in Windows without typing each file name manually.

One solution we found was the Acrobat advanced search. We performed a search on the subject of our audit, selecting the folder that contains all manuals. Our audit aimed to find content on batteries, which most of our products had. So we typed the word battery. We saved the results as a CSV file and there we had usable data! The file

provided a summary of the search, the file name, its title, the page of the keyword instance, and the actual instance where the word was found.

You could perform your content audit via a book sprint approach. A book sprint brings together a group of writers to produce a book in three to five days. There is no pre-production and the group is guided by a facilitator from zero content to published book (*www.booksprints.net/about*). If you can build such a team, not only will you have your audit done quickly, but you will also have all these sets of eyes on your content and the reviewers you dream of, because developers know their audience and the subject matter (*http://fr.slideshare.net/sarahmaddox/stc-summit2013-presentationsarahmaddoxdocsprints*).

Organizing Content: The Content Puzzle!

You know your products well, but you need to determine what will be task, concept, reference (snippets only in Word), and what will be filtered (conditions in Word). You will also need to determine variables and how write to have the smallest number of possible variables.

Variables and Translation

If your product is fruit, then the content of the variable could be apple, pear, or grape. When fruit translates with articles that have gender, the fun begins. Apple, pear, and grape become la pomme, la poire, and le raisin in French. So you cannot write **le <fruit>** because it could be also **la <fruit>**. One solution is to stay neutral. Use as little variables as possible. But you may eventually have to tackle this issue. The same goes for plural and this occurs even in English: carrot(s) and potato(es), for instance. Keep to the generic word (vegetable), or include the article in the variable list. But the most reasonable approach is to remain as general as possible, and chunk the text in smaller parts.

Mind Mapping

Content analysis and inventory of tasks, concepts, and references are well documented. Building documents is harder to define. Invest time up front to inventory identical, similar, and unique content so you can design filtering and reuse strategies that satisfy your business requirements without making your content unmanageable. It's far less expensive to plan and implement reuse from the beginning than to retrofit reuse later (Lewis 2012). Table 2 shows an approach that worked for us.

First, you need to decide how to divide blocks of information. We took our four products and built a matrix of all possible options.

Then you see how to group the text chunks. Consider each line in Table 3 as a block of text (a task). Green applies to products 1 and 2, blue is product 3 only, grey is 4 only, and yellow is common to products 3 and 4. Products 2, 3, and 4 have a common text, which ended up being a new reuse chunk that had not been expected.

	Big keypad	Small keypad	Trolley	Small trailer	Big trailer	Solars at the top	Solars on trailer	Stabilizer legs	1 pin	11 pins
Product 1										
Product 2										
Product 3										
Product 4										

Table 2. Viewing required text at a glance.

Product 1	Product 2	Product 3	Product 4
Inspection		**Inspection**	**Inspection**
Item 1	Item 1	Item 1	Item 1
Item 2	Item 2	Item 2	Item 2
		Item 3	Item 3
			Item 4
Setup		**Setup**	**Setup**
Step 1	Step 1	Step 1	Step 1
Step a		Step 2	Step 2
Step b			Step 3
Step c		Step 4	Step 4
Step 2	Step 2		Step 5
	Step 6	Step 6	Step 6

Table 3. Selecting conditions.

Conclusion

By using one of your major skills—organizing—your content reuse strategy project will come to life much faster because you are using a familiar approach. Like any project, you will need to define feasibility, needs, and costs, and be well prepared and ready for multitasking and leadership challenges. This experience was a career change for me and I was praised by the management for learning it.

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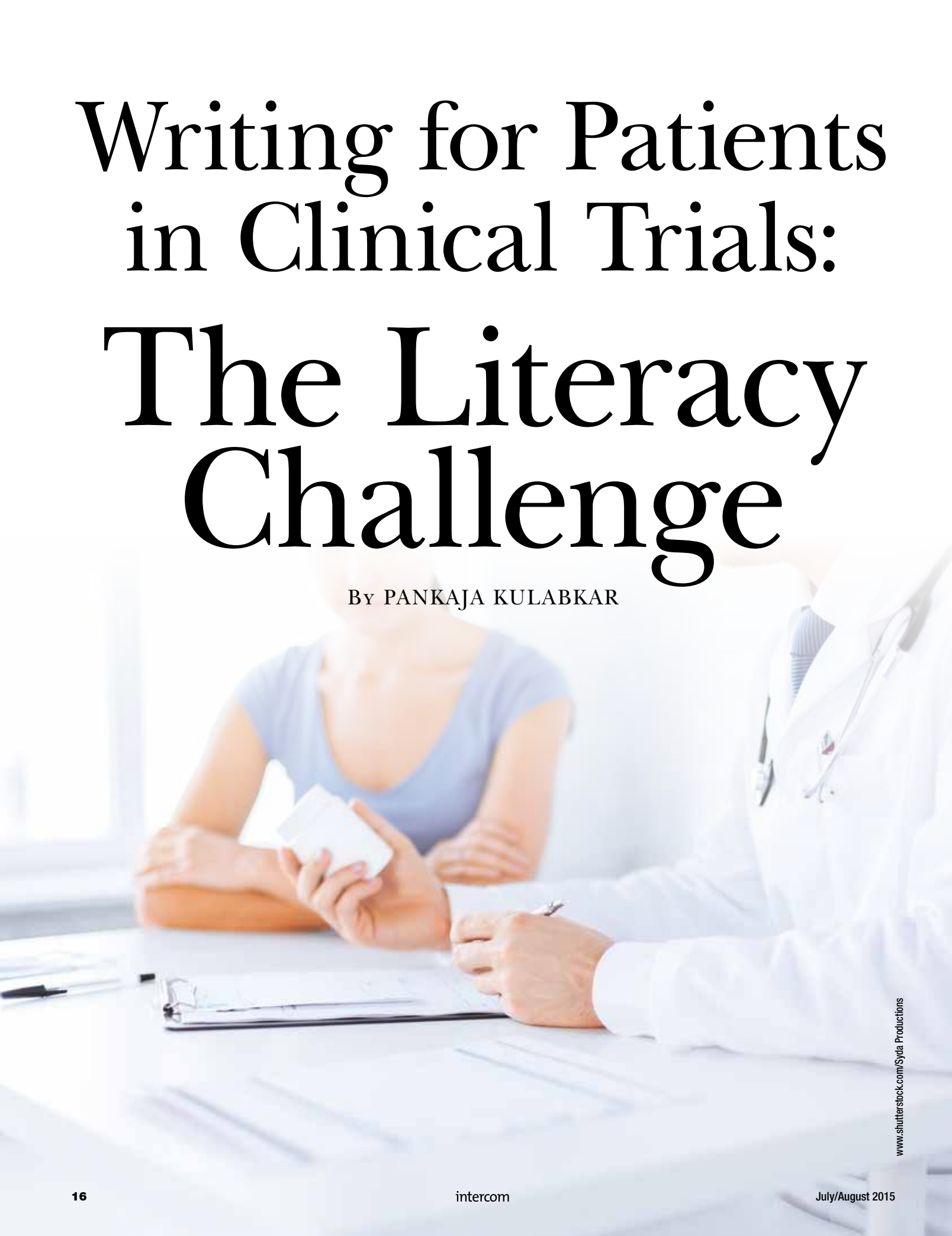
Writing for Patients in Clinical Trials:

The Literacy Challenge

By PANKAJA KULABKAR



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BECOME "PATIENT-CENTRIC." "Partner" with patients. Enhance "patient experience." These are the buzzwords in the health industry today. As writers, how do we meet these expectations when we write for patients?

Patients represent a wide audience across cultures, literacy rates, abilities, and age. How can we write so that the content appeals to them all? The exercise becomes even more difficult when we write to motivate patients to participate in clinical trials. A clinical trial is a research process, it is not a treatment. Patients do not see any obvious reason for participating in clinical trials.

There are many challenges, but this article focuses on just one—the literacy challenge. The literacy challenge confronts all countries, including the developed countries.

Getting Maximum Response from Patients

If our audience consists of both literate and illiterate readers, how should we write for a patient audience that includes both? What communication modes should we follow so that they both understand what we say? What style should we adopt so that both find the content appealing?

The key lies in understanding patients' vulnerabilities and expectations and in addressing them. Let's meet a patient now. She is Rina. Rina has Type 2 Diabetes and lives in India. Her grandmother is visiting her. While Rina is well-educated, Grandma is illiterate. We'll take a quick look at how they respond to clinical trial information.

One Day in Rina and Grandma's Life

It is Monday morning and Rina is getting ready to go to work. The newspaper has just been delivered and Grandma picks it up from the floor. Her attention is drawn to a picture on the front page. Grandma asks Rina what the picture is about. Rina looks at the picture and realizes that it is an advertisement. She reads the newspaper advertisement aloud (see Figure 1).

Rina goes to work. In the evening, she has an appointment with her doctor. Grandma accompanies her. As they step into the hospital premises, Grandma points to a poster and says, "This picture is of the same doctor that we saw in the newspaper today. Is the poster about the same clinical trial?" Rina looks up at the poster, reads what the poster says, and nods in affirmation.

At the clinic, a video is playing about clinical trials. Both Grandma and Rina watch the video.

Rina and Grandma take the bus back home. As they walk down from the bus stop to their house, they see a crowd in their neighborhood park. What's the matter, they wonder. As they walk toward the crowd, they realize that the crowd is watching a street-play. (A street-play is a traditional form of communication in India. This is an effective and low-cost mode of communication. There are no stage props. Performers perform in public places. The play is short. Catchy tunes and humor are often used to attract and retain people's attention.)

They join the crowd and watch the street-play. The scenes are similar to what they have seen on the video at the doctor's clinic. After watching for a while, Grandma whispers to Rina, "The play is about a clinical trial." After the play is over, the actors distribute flyers about the clinical trial.

Let's now see how to make clinical trial information easy and appealing for patients like Rina and Grandma.

Make Patients Feel Important

John Dewey, the famous philosopher, said that the deepest urge in human nature is the "desire to be important." Patients are no exception to this need. All that patients usually get are instructions on how to lead their lives, what to eat, and what not to do. At best, they may get some sympathy from others. That is all. Does anyone take the effort to make them feel important? Not really.

If there is any process in the world that depends for its existence upon patients, it is a clinical trial. If patients do not join clinical trials, we will have no clinical trials at all. Without clinical trials, there will be no new medicines in the market. This is not a situation we want to be in.

We need patients to be interested in joining clinical trials. The key is to involve patients and make them *feel important*. The "desire to be important" is felt by all, regardless of where people are on the literacy scale. But how do we make patients feel important?

DIAGNOSED WITH TYPE 2 DIABETES?

We are running a clinical trial on Type 2 diabetes. To carry out the clinical trial, we need volunteers.

To qualify, you must have Type 2 diabetes and must be 18 or above. If you meet these requirements, we would love to hear from you.

Do call Dr Mitali Oak's team at 0800 123 4567. They will be more than happy to answer your questions.

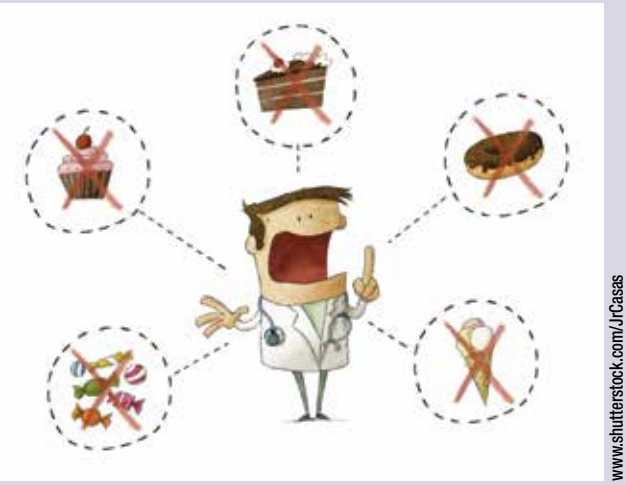

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Figure 1. Say "no" to sweets.

Involve Patients in Designing the Content

As technical communicators, we know the importance of audience analysis for effective documentation. Let's take the effort to understand what patients want, their vulnerabilities, and what motivates them.

For example, while interacting with patients with hearing loss, we learn how difficult it is for them to watch videos without sign language and text. Or while interacting with patients with low literacy, we sense their discomfort when asked to read something. These insights help us to plan and implement better communication strategies.

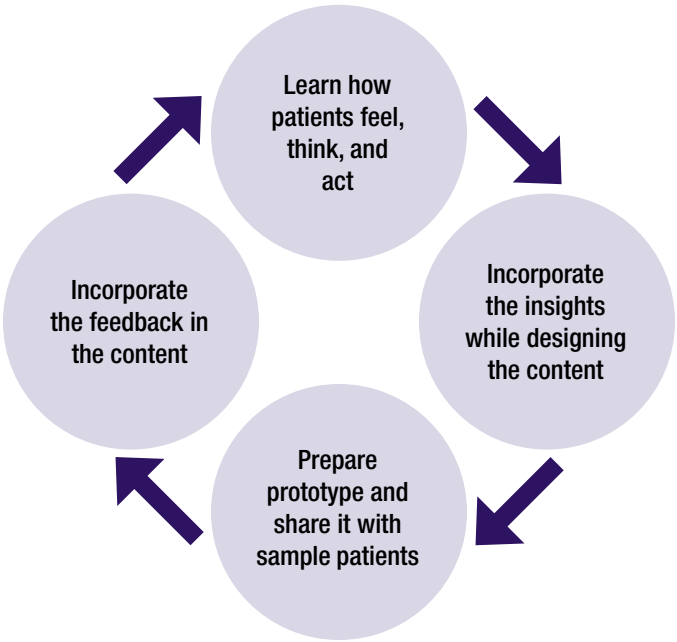
Learn how patients feel, think, and act
Incorporate the insights while designing the content
Prepare prototype and share it with sample patients
Incorporate the feedback in the content

Figure 2. The Involvement Cycle

After developing prototypes, we must go back to patients to get their feedback. This makes patients feel important. If we incorporate their ideas, we must give them credit. Let them *feel* that the ideas are theirs. Patients will then feel closer to the message.

Talk in their Terms

Patients have their share of problems. If we want to gain their attention, we need to say what they want to hear. One way is to tell them that we need their help to improve the lives of people who are in a similar situation as they are. This will do two things. The strategy will make patients feel important. Our plea will also help them relate to others afflicted by the same health problem or disease. We then have a higher chance of getting their attention to our message.

Empathize with Patients

Patients listen to instructions day after day. Everyone tells them how to lead their lives. Let's not make clinical trial information yet another piece of instruction. A conversational and friendly style does wonders.

WILL YOU HELP OUR RESEARCH ON TYPE 2 DIABETES?

If you have Type 2 diabetes, you know the challenges that come with it. You face it every single day.

Currently, we are doing medical research on a treatment for Type 2 diabetes. In technical language, the research is known as a clinical trial. The objective of a clinical trial is to explore whether a new treatment is safe and effective for human use.

If successful, this treatment may prove to be more effective than the ones available today. But we can't do much without your participation in the clinical trial.

For carrying out this clinical trial, we need volunteers to try out the treatment. To qualify, our minimum requirement is that you must have Type 2 diabetes and must be 18 or above.

If you meet these requirements, we would love to hear from you. Partner with us in our quest to make life easier for millions affected by Type 2 diabetes.

But your health and safely are our primary concern. Do consult your physician before thinking of joining our clinical trial.

If you have questions about our clinical trial, call Dr Mitali Oak's team at 0800 123 4567. They will be more than happy to answer your questions.

Let's now improve upon the newspaper advertisement. Right from the title, the advertisement's focus is upon patients. The title and the introduction do not talk about what the clinical trial or doctors need. Instead, the advertisement talks about the challenges *patients* face. It talks about the clinical trial's quest to help *patients* lead a better life and urges patients to be a *partner* in this quest.

Appeal to Patients' Nobler Motives

Clinical trial information is different from instructions that appear on medicines. Patients take medicines to get better. The purpose of the instructions is to help patients take the medicine correctly. Imperative language and tone may be fine here.

But clinical trials are different. Patients do *not* have to participate in clinical trials to get better. Imperative language and tone will not work here. To get them interested in participating in clinical trials, we need to appeal to their good will, nobler motives, and altruism.

Encourage Patients to Talk to Those with Clinical Trial Experience

Your organization may have contact details for patients who have prior clinical trial experience and are willing to share their experience with others. Encourage your patient audience to talk to them.

Instead of "selling" the clinical trial idea to patients, give them references of people to whom they can talk. Let them

discuss, analyze, and then own the decision to consider participating in clinical trials.

Here is a television advertisement script for a Type 2 diabetes clinical trial that shows this rhetorical technique.

> Dr. Mitali Oak: Hi, I am Dr. Mitali Oak. I treat people with Type 2 diabetes. My team and I are currently doing a medical research on Type 2 diabetes.
>
> We can't do this research on our own and need your help. If you have Type 2 diabetes, are 18 years of age or above, and have the passion to improve the lives of millions of people affected by this medical condition, please step forward.
>
> If you want to know more about our clinical trial, please call us at the number you see on your screen. To give you a better sense of what clinical trials are about, we will be happy to send you contact numbers of those with prior clinical trial experience.
>
> If after talking to them, you think it is a good idea to join the clinical trial, please contact us again. Also, please spread the word among your friends who have Type 2 diabetes.

Keep the Content Short

Printed material is easy to distribute among patients, but do keep the content short. Bullets are often used in printed material. Experts say that the short-term memory of even well-educated and well-trained adults seldom stores more than seven items.

Include a Mix of Communication Modes

A mix of both printed and audio-visual modes is a good strategy when our audience includes both literate and illiterate patients. In our example, we saw that Grandma did not understand the printed material, but she could easily interact with the video and street-play.

Address their Special Needs

Patients have special needs. For example, we want to reach out to patients with visual disorders. Imagine patients sitting in an eye clinic with eye drops administered and eyes closed. Will videos work in this scenario? Obviously not. Instead, audios with some soothing music in the background would be more effective. And audios work both with literate and illiterate patients.

Use the Same Theme Across Communication Modes

A patient audience recognizes content better when we use the same theme, examples, and images across the communication modes for the same clinical trial. In our example, Grandma instantly recognized the picture on the poster because she had already seen the picture in the newspaper advertisement. She could not read the text on the poster, yet the picture helped her associate the poster with the clinical trial.

Include Culture-specific Themes and Pictures

If we want our audience to relate to the content and remember it, use themes and pictures that are culture specific. These help people connect to the message. If we want our message to appeal to patients across the literacy scale, let's remember the simple rule: "Be sensitive to patients' needs and give them the importance they deserve. Remember, clinical trials just cannot exist without patients." i

DR. PANKAJA KULABKAR *is currently working on clinical trial documentation and loves sharing her experiences with the STC community. She will be delighted to hear from you on this article at* pankaja.kulabkar@yahoo.com.

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Disclaimer: The names in the article are fictitious.

ASD Simplified Technical English (STE) term checker

STE helps to make instructions as clear as possible. But, STE has many grammar rules and thousands of dictionary rules.

To remember all the rules is difficult. Can you remember the approval status of the word *fluid*?*
- Not approved
- Approved as a noun
- Approved as an adjective
- Approved as a noun and as an adjective.

Can you remember your organization's technical terms and the unapproved alternatives?

The STE term checker from TechScribe helps you to make sure that your text conforms to STE.

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* *Fluid* is approved as a noun only, unlike *liquid*, which is approved as a noun and as an adjective.

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The Latest and Best Features in Adobe's FrameMaker 2015

By JANG F.M. GRAAT

FRAMEMAKER'S PRODUCT DEVELOPMENT team shows no signs of fatigue. After adding big chunks of functionality in the previous releases, the latest edition shows important improvements in a variety of domains.

The most apparent change in FrameMaker is, of course, its naming convention. Eighteen months after the release of FrameMaker 12, Adobe has now decided to avoid the unlucky number 13 and went for the year instead. Many other software companies have done the same over the past decade. It will come in handy when, years from now, the tech authoring team is trying to convince their management that an upgrade is required. "But our current software is 5 years old, just look at the version number!"

More important is the contents of the new software package. At first glance, most of the known features have not changed much. But once you go through the menus and functions with a little more attention, it is apparent that a lot of effort was put into the product. This is not merely a cosmetic release. In this review, I cover the new features that I feel to be important, even if that importance is not the same for all users.

Embracing Diversity: Bi-directional Language Support

Most of us accustomed to reading and writing in English tend to forget there are languages that require a radically different approach to creating an authoring environment. Since the introduction of Unicode (in FrameMaker 8) has gotten rid of most translatability issues, by allowing all possible character sets to be incorporated into the same document without having to get down and dirty with codepages, the next big reform concerns the direction in which those characters are strung together.

Supporting right-to-left (RTL) languages, such as Hebrew and Arabic, is not as easy as simply reversing the direction. When authors write about products that have their names written left to right, these product names will have to show up as LTR, no matter the text direction of the paragraph. Also, product manuals or Web pages might contain text in multiple languages on the same page. This implies that one language direction switch on the top level, as is the case in Madcap Flare, is not going to solve the issue. True RTL language support requires support for bi-directional content. If a paragraph is RTL, it may still contain a term that is LTR. It is this mix of RTL and LTR components that make things complicated.

And there are even more aspects to consider. It is not just language that may have to be rendered in one or the other. What about sidehead alignment of content, or the appearance of graphic items? It is not enough to allow defining such features while creating the content: you will want to pull translated content back into FrameMaker to do the final checkup and creation of Arabic and Hebrew versions. This means that you should be able to switch from one alignment to another, using the language direction settings that may be defined on every individual object.

This is exactly how it works in FrameMaker 2015: each element on the page, as well as on the master page, can be explicitly set to "right-to-left" or "left-to-right." When the default "inherit" setting is selected, higher elements in the hierarchy of objects are queried until an explicit setting is found. If no direction settings are found in the entire document, the default LTR direction is used. Flipping the direction after a translation is returned is easy, and when you have marked page elements, tables, graphics, paragraphs, or text sections with an explicit text direction, they will not be affected. Playing around with these new direction tools feels like magic (see Figure 1).

Of course, things become really interesting when you are working in a structured environment that supports text direction, such as DITA. With the "dir" attribute that was already present in DITA 1.1, any piece of content can be made to remain RTL or LTR as desired, or can use inheritance from elements higher up in the structure. Again, the definition of content direction works along the entire structure and may lead to publications that contain chapters in both directions. With this level of bi-directional support, it is a shame not to have a lot of customers in the RTL language areas (yet).

Figure 1. Text and graphic content flows in either direction in FrameMaker 2015.

Simplifying the XML Experience

In the previous FrameMaker release, Adobe introduced an author view as a kind of middle ground between the sophisticated WYWIWYG environment and the somewhat geeky XML view. The author view provided a simplified structured authoring experience, from which all direct formatting and visual page references were removed. The authors get visual feedback on the structured content they are creating, but do not have the ability to tweak that content explicitly by setting characteristics such as font sizes and styles, line spacing, or other types of overrides. Those buttons and commands were removed from the interface in this author view.

In FrameMaker 2015, the author view has received another option, which is designed to allow subject matter experts (SMEs) access to sections of the content in a further simplified authoring environment. This simplified XML editor is enabled via a preference setting. Once chosen, a form-like authoring screen is shown from which all structure is removed. Elements can be inserted via a special toolbar, which can be configured in various ways to accommodate different types of structured documents. In one document, you might want to allow an SME to create a basic topic from scratch, whereas in another the SME is supposed to fill in the blanks without touching what is already there.

Whether this novel approach to simplify XML editing is going to be popular remains to be seen. It seems that dumbing down an XML standard, to a point where a non-structure-savvy SME can use it, might lead to poorly marked-up content, in which case the use of XML does not add much value over WordPress or plain HTML. The quality of the markup may depend on the amount of work put into setting up the templates for each particular case. The good news is that roundtripping to either the full WYSIWYG or the formal XML views remains possible, so that you are not obliging your tech docs department to minimize their use of the full standard. As a new approach to XML editing by non-XML authors, it is an interesting path to follow, even if it will be from a safe distance. We will see what this simplified future will bring.

DITA 1.3: More and Less DITA at the Same Time

FrameMaker was one of the early adopters of DITA, and it is a good sign that all of the documentation for the FrameMaker and RoboHelp products was created in DITA. The cows may be holy, but they are eating their own dog food in India. To me, it was not a big surprise that FrameMaker 2015 features support for the latest version of the standard, as I was involved in the creation of the DITA 1.3 EDDs and templates myself. This does give me an advantage in explaining what are the most important enhancements in FrameMaker's DITA support.

The timing of the FrameMaker 2015 was excellent: shortly after the new FrameMaker version was officially released, the DITA 1.3 draft for public review was published. If no dramatic errors in the specifications are found, the new standard should become official early next year. And as this

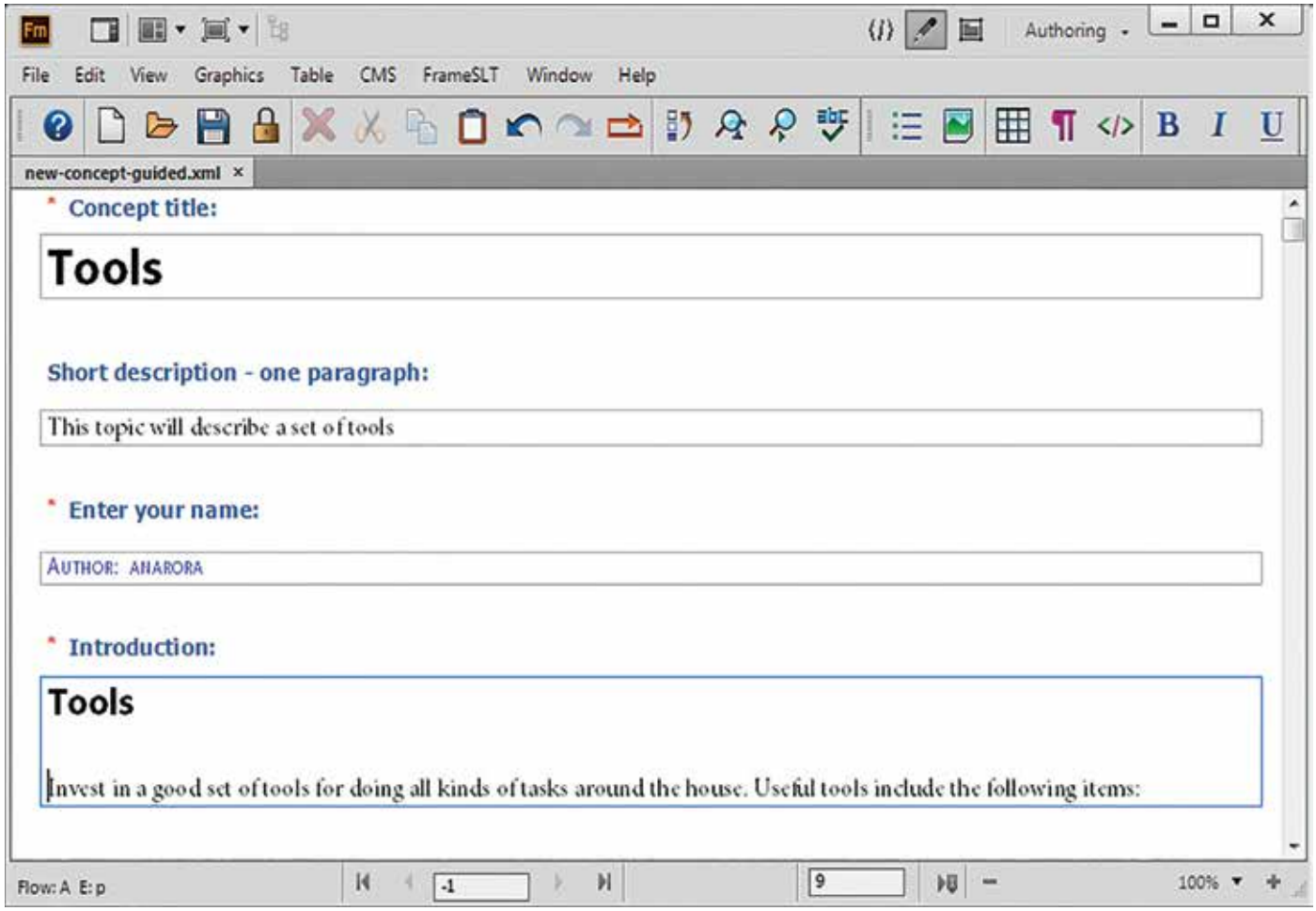

Authoring
File Edit View Graphics Table CMS FrameSLT Window Help
new-concept-guided.xml
* Concept title:
Tools
Short description - one paragraph:
This topic will describe a set of tools
* Enter your name:
AUTHOR: ANARORA
* Introduction:
Tools
Invest in a good set of tools for doing all kinds of tasks around the house. Useful tools include the following items:
Flow: A E: p
-1
9
100%

Figure 2. A form-type interface keeps SMEs within the required structure.

is an evolution rather than a dramatic redesign, all the signs tell us that nothing dramatic will happen.

There are several new domains in DITA 1.3. Notably, these are the SVG and MathML domains, the release management domain, and the XML mention domain. Also, there is an important new "deliveryTarget" attribute and several elements and attributes to better support contextual help delivery. Although these new domains and attributes make it possible to apply DITA to new business areas and media, I will not cover them all here.

If your organization wants to take no chances and stay with DITA 1.2 for a while, there might be good reasons to go for the DITA 1.3 support in FrameMaker 2015 and leave out the domains and elements that were added. Effectively, you will be working with DITA 1.2, but you will have the advantages of using the redesigned DITA EDDs and templates. Here's why this would be a good move to make.

The true added value in the new DITA 1.3 implementation is the option to easily implement constraints. These were introduced in DITA 1.2 as an effective way to limit the exposure of the standard to your authors. Instead of changing the DTDs, templates, and transformation scenarios, you could simply add constraint modules to the full standard, which effectively removes elements from the available catalogs. This became a necessity as the number of elements in DITA grew steadily with every business domain for which the basic elements were specialized.

Nobody in their right mind should be using DITA out of the box, without first analyzing which elements are applicable to their business domain, and filtering out all the others. This is the sole reason why the EDDs and templates were reorganized from the ground up. Problems with nested text insets and incomprehensible variables were removed, and the use of conditional text was enhanced, using all the new options provided by the improved conditional text expression builder.

With the new set of DITA 1.3 EDDs, anyone can now build a constrained EDD for any DITA topic or map type in minutes, where in the previous implementation this job was time-consuming and required a lot of technical knowledge (see Figure 2). The document shell EDDs contain lists of domains and conditions that are included and offer direct visual feedback on the validity of the chosen combination of conditional text snippets. Even if you are only using DITA 1.2, the DITA 1.3 EDDs with their support for constraints will make you much more effective in offering the optimal set of elements to your technical authors. And this requires no knowledge of DTDs or EDDs whatsoever.

Responsive HTML5
Filter by
Product
FM10
FM11
FM12
System
Mac
Windows
Language
English
German
Dieses Dokument beschreibt die Installationsanweisungen
Download und Installation unter Mac OS
1. Nach Abschluss Ihrer Bestellung, klicken Sie auf Download Ihre Produkte
Hinweis:
Der Download abgeschlossen ist schneller auf eine fest verdrahtete Verbindung
2. Machen Sie im Download-Seite finden Sie den Produktnamen und die Serie
Akamai Download Manager-Link für das Produkt die Sie herunterladen. We
Browser deaktivieren drehte für die gesamte * .adobe.com Domäne. Nach
erneut.
3. Wenn ein Dialogfeld angezeigt wird gefragt, ob Sie das Zertifikat von Akam
4. Wenn Sie noch nicht installiert den Akamai NetSession Schnittstelle haben,
die Download-Installer.
• Wenn der Dateidownload-Fenster öffnet, doppelklicken Sie auf den Installer
• Ein Akamai NetSession Ordner öffnet mit einer PKG-Datei. Doppelklicken
• Das Fenster Akamai NetSession Installer wird geöffnet. Klicken Sie auf We
• Akzeptieren Sie die Lizenzvereinbarung, indem Sie auf Akzeptieren. Wählen
Sie auf Weiter.

Figure 3. Viewers decide which content they need to see.

Putting the User in Control of the Content

On the publishing side, the main additions to FrameMaker appeared in the previous release, when the publishing engine of RoboHelp was incorporated into the product. One-click publication of up to five different output formats became a true option. What is more, the definition of the CSS that governs the look and feel of your responsive HTML5 design was made as easy as is humanly possible (see Figure 3). A fully visual and totally easy CSS editor was built into the settings dialog. In FrameMaker 2015, there are further enhancements to this feature and the option to publish directly to native mobile apps for iOS and Android was added.

More media and more CSS options are nice, but they are not devastating new features. What is truly new in the interactive output, however, is the inclusion of filtering options—not filtering before publishing but after the materials are delivered to the user. This is another feature that has crossed over from RoboHelp to FrameMaker, and it has been implemented well. Instead of creating multiple outputs, one for each target group, you now have the option to pass the conditions (with which you have marked up your content) into the output and give the users the ability to filter the output as they see fit. You define the labels, set the corresponding conditional text expressions, and the publishing process creates the filter controls in the output. This not only optimizes production of output, as you no longer have to create one set of files for each target group, but you also provide content that will be more useful for each individual user. After all, who are you to decide what each user already knows? How well do your personas match each and every user in your imagined target group? In fact, only the user knows what the user already knows. What the users need from the help system is based on the gaps in their knowledge that they can probably define best for themselves.

This new approach to filtering content in the output brings progressive disclosure within reach without having to spend a lot of work on defining your own transformation scripts or Web application. It is a welcome addition to a publication chain that was already impressive.

JANG F.M. GRAAT *(yes, those are the middle initials that my parents chose for me, long before the FrameMaker product was even invented) has studied physics, psychology, and philosophy before embarking on a fast-track career in the international high-tech computer business in 1987. He has worked as technical author, consultant, and trainer and has delivered countless presentations and training courses on a wide variety of computer-related topics around the globe. He has been self-employed for 20 years and recently joined Tom Aldous in The Content Era. He lives in Amsterdam with his princess, two cats, a library of philosophy and psychology books, a bunch of musical instruments and, of course, a handsome collection of cool computers.*

Phylise Banner Honored with 2015 President's Award

AT THE OPENING General Session for the 2015 STC Summit in Columbus, President Kit Brown-Hoekstra named her recipient of the President's Award. The President's Award honors one or more persons or institutions that have made distinguished contributions to the profession or the Society.

This year's honoree is Phylise Banner.

Her citation reads: For your dedication to our profession and to STC; for your creativity, visionary thinking, teaching, and speaking abilities; and for all the work that you have done over the years helping STC build its online educational programs, Virtual Summit, and conferences.

Currently the Director of Online Teaching and Learning at Union Graduate College, Phylise Banner is an accomplished and creative training executive with expertise in instructional strategies and professional development solutions.

Throughout her career, Phylise has worked closely with faculty, staff, students, and IT managers to design, develop, and deliver technology-based solutions across departments and disciplines. She regularly embraces opportunities to experiment with emerging technologies in order to best serve adult students at a distance, and to create communities of lifelong learners.

Along with her current achievements in training, professional development, adult learning, and distance education, she has over 18 years of experience in information visualization, with special expertise in the visual representation of financial and economic data. Her career as an informational graphics specialist with the Federal Reserve in the 1980s allowed for early access to Internet technologies, sparking her interest in hypertext and the integration of technology into teaching and learning.

Phylise presents regularly at regional and national technology and communication conferences on the topics of information design, experience design, creative hypertext, Web 2.0 applications, instructional design, information visualization, and GIS technologies. She also teaches digital storytelling and information design online for Empire State College and SUNYIT. Her current research focuses on the use of Web 2.0 applications to establish community and visual presence in the online classroom.

She is an avid angler, aviation enthusiast, and is currently training to be a private pilot. She is the proud owner of a 1967 Amphicar.

Congratulations to Phylise! Thank you for your service to STC and to the profession of technical communication.

STC Names "Most Improved Community" and "Community of the Year" Winners

STC UNVEILED THE winners of two community awards at the 2015 Summit: The Most Improved Community and the Community of the Year. These awards were introduced at the 2011 Summit to complement the current community awards and provide an extra incentive for chapters and SIGs.

The Most Improved Community is given to the community that "stepped up their game" the most from one year to the next, based on their applications for the Community Achievement Award (CAA). This year the award goes to the **Phoenix Chapter**.

Their citation reads: For your tremendous increase in chapter activities between 2013 and 2014, for rebuilding your chapter, and for serving as a model host for the 2014 STC Summit.

The Community of the Year Award is presented to the community that had the highest score of all of the outstanding Communities of Distinction. The fifth annual Community of the Year Award goes to the **Carolina Chapter**.

Their citation reads: For a truly solid, activity-packed year during the 2014 Community Achievement Award year. The Carolina Chapter serves as a role model for STC chapters who want to succeed in programs, mentoring, communication, student outreach, and overall member value.

Congratulations to the leadership and members of both communities!

Associate Fellows: Complete Your Fellow Applications by 1 October 2015

EACH YEAR, THE STC Fellows Nominating Committee invites STC Associate Fellows who have held that rank for three years or more to submit an application to the committee for possible elevation to the rank of STC Fellow. This honor recognizes members' significant achievements in and contributions to the field of technical communication and sustained and significant service to STC. It is the highest honor that STC can bestow upon a member.

If you are an STC Associate Fellow who was inducted to that rank at or prior to the 2013 STC Technical Communication Summit, we invite you to submit an application to the committee. The committee thoroughly reviews each nominee's application, researches and verifies the nominee's qualifications, and contacts the nominee's references. When all evaluations are completed, the committee recommends qualified nominees to the STC Board of Directors for consideration. Those nominees receiving a two-thirds favorable vote from the board will receive the honor as long as their membership is in good standing and they meet the requirements as stated in the guidelines. (If the committee determines that a nominee is not qualified for elevation to the rank of STC Fellow, it will provide a brief explanation of why the nominee does not meet the qualifications.)

To be considered for elevation to the rank of STC Fellow, you must have accomplished all of the following: (1) performed important work and attained distinction in the field of technical communication; (2) done notable original work that has contributed to the advancement of the field; and (3) made significant contributions to the STC and helped to tell STC's powerful story. Length of career, quality of accomplishments, service to the Society, and continuity of achievement are all factors in the selection process.

You can find the application and related information on the STC website at *www.stc.org/membership/recognition/honors*. Send your completed application to the Society office at *stc@stc.org*, with a copy to Larry Kunz at *lk81924@gmail.com* to arrive no later than 1 October 2015. The committee will forward their recommendations to the STC Board, who will consider nominees in January 2016. The Society will recognize new Fellows at the honors reception in May at the 2016 STC Technical Communication Summit in Anaheim, CA.

For more information, review the Fellows Committee page available at *www.stc.org/membership/recongitions/honors* or contact Committee Chair Larry Kunz at *lk81924@gmail.com*.

Please note that there is an administrative fee of $25 that must accompany your application.

Pacesetter Awards

THE PACESETTER AWARD recognizes communities for the successful implementation of a single beneficial innovation that may be replicated by other STC communities. It honors those chapters that have done something unique indicating progress in their programs or growth. Congratulations to the honorees.

Orlando Central Florida
For innovative fundraising to support chapter activities, particularly your partnership with California Pizza Kitchens and United Way payroll deductions.

New York Metro
For gamification of all your chapter activities, which engages all members in a fun, innovative way.

STC India
For success with your YouTube channel to educate members and promote technical communication.

Associate Fellow Recommendations Due 1 October 2015

EACH YEAR, STC MEMBERS and communities have the opportunity to recommend senior members for the rank of STC Associate Fellow to the Associate Fellows Committee. This honor recognizes members' achievements in the field of technical communication, contributions to STC, or both.

Any voting member of STC may submit a nominee's application to the Associate Fellows Committee, including those who wish to apply on their own behalf. The committee reviews each nominee's application and contacts the identified references. Based on evaluation of the information collected, the committee forwards nominees to the STC Board of Directors for consideration. Those nominees receiving a two-thirds favorable vote from the board will receive the honor as long as their membership is in good standing and they meet the requirements as stated in the guidelines.

To be considered for selection as an Associate Fellow, the nominee must have been active in the field of technical communication for at least 15 years and have been a member of the Society for at least 10 years, as of the application submission deadline. They must also be members in good standing at the time of the application and at the time of the honors banquet the following May. But, most importantly, the nominee must have significant accomplishments one or more of the following areas: (1) performed important work and attained distinction in the field of technical communication, (2) done notable original work that has contributed to the advancement of the field, or (3) made significant contributions to the Society and helped to tell STC's powerful story.

In August, the STC office and the Associate Fellows Committee will send a message to STC qualifying senior members and Society and community leaders describing the nomination process and the information required for a nominee's consideration by the Associate Fellows Committee. By August, this information will also available on the STC website at *www.stc.org/membership/recognition/honors*. Upon request, the Society office will email community leaders a list of all eligible nominees in their communities. Please email your request to *stc@stc.org*. If you want to submit yourself or a colleague as a nominee for Associate Fellow, please use the Recommendation for Associate Fellow form and refer to the completed sample forms on the STC website.

The Associate Fellows Committee encourages submitters to work with nominees to ensure applications are complete and accurate. Please use e-resources whenever possible so that the committee can check facts, publications, presentations, and the nominee's presence online. It is not the length of the application that will ensure the acceptance of the nominee, but the consistency, variety, and level of work and influence the nominee has had on technical communication and the Society. An online portfolio would be an ideal resource. Remember that this is an STC honor and emphasis will be placed on STC accomplishments.

The committee recommends involving Associate Fellows, Fellows, or members who are experienced in submitting Associate Fellow applications. Also, the committee *strongly recommends* that the submitter be fully convinced that the nominee meets all the criteria for recommendation as an Associate Fellow. Keep in mind that those who attain this honor serve as models of our organization. This honor is not easily attained and those who receive the honor have worked for many years to support the profession and the Society in various ways.

Completed nomination packages must be received by the committee by **1 October 2015.** Send them to the STC office at *stc@stc.org*, with a copy to the Committee Chair Brian Lindgren at *brianjlindgren@gmail.com*. In January 2016, the STC Board of Directors will consider the nominees forwarded to them by the Associate Fellows Committee. In May, at the 2016 STC Technical Communication Summit in Anaheim, CA, the Society will recognize the new Associate Fellows at an honors reception.

For more information, refer to the Associate Fellows Committee Web page at *www.stc.org/membership/recognition/honors* or contact Brian Lindgren at *brianjlindgren@gmail.com*. Keep in mind that some changes have taken place over the past couple of years and the website and guidelines reflect the changes noted below.

Qualifying senior members can self-recommend—however, the application must be endorsed by two senior members, one of whom must be a community leader or hold an honorary STC rank. Endorsers cannot also serve as a reference for the same nominee. No member of the STC staff, the STC Board of Directors, or the Associate Fellows Committee can serve as submitter, reference, or endorser.

Please note that there is a one-time, $25 administrative fee.

STC Communities and Staff Earn APEX Awards

STC IS PROUD to announce that five STC communities and the STC staff recently were named winners in APEX 2015, the 27th Annual Awards for Publication Excellence. APEX Awards are based on excellence in graphic design, editorial content, and the ability to achieve overall communication excellence. APEX Grand Awards honor the outstanding works in each main category, while APEX Awards of Excellence recognize exceptional entries in each of the individual categories. Out of over a thousand entries, just 82 won APEX Grand Awards.

Congratulations to the following STC winners:

- **Carolina Chapter** (Rick Sapir): APEX Award of Excellence in the category of Newsletters – Electronic and Email
- **Chicago Chapter** (Linda Kelley): APEX Award of Excellence in the category of Newsletters – Electronic and Email
- **New York Metro Chapter** (Julie Waxgiser, Nitza Hauser, Wee Shufti): APEX Award of Excellence in the category of Social Media – Best Series of Blog Posts
- **Washington DC-Baltimore Chapter** (Cynthia A. Lockley): APEX Award of Excellence in the category of One to Two Person-Produced Websites
- **Technical Editing SIG** (Rick Sapir): APEX Award of Excellence in the category of One to Two Person-Produced Websites
- ***Intercom*** (Liz Pohland): APEX Award of Excellence in the category of Magazine, Journal, & Tabloids Writing.

WINNER 2015 APEX® AWARDS FOR PUBLICATION EXCELLENCE

Also, the 2013–2014 *STC Salary Database*, written by Rick O'Sullivan, won an APEX Grand Award in the category of One-of-a-Kind Publications. The APEX Grand judges said of the Salary Database:

"You can tell a story with data. This database does, and it tells it very, very well. An enormous amount of raw data is compiled, organized, evaluated, and analyzed to extract the key data points that readers need. If you want macro information, it's here. If you want to drill down for the most specific micro information, it also is here. The clarity and visual communication of the data is exceptional. If your quest is salary information in the technical communication field, this is your bible."

Congratulations to the winners! For more information on the APEX Awards and a full listing of winners, visit *http://www.apexawards.com/*.

"I WAS ABLE TO SMOOTHLY TRANSITION BETWEEN CAREERS, THANKS TO STC"
"My STC student membership was extremely valuable. After going back to school, I took two of STC's online courses, and the knowledge I gained continues to prove useful on the job. I look forward to further professional development as a New TC Professional member. Meeting other people in the field and taking on leadership roles in my chapter has not only contributed to my success, but it has also allowed me to stay on the cutting edge. I think that both students and new professionals can benefit tremendously from the people and resources of STC."
Rachel Mahan
MY NAME IS RACHEL MAHAN AND
I'M AN STC MEMBER
STC.org/renew

Nomination Process Opens for STC Academic Awards

STC RECOGNIZES individual member achievement through several award programs. Below is information on the academic award programs and their deadlines.

Sigma Tau Chi and Alpha Sigma Honor Societies

STC sponsors two honorary societies for students, and this year the criteria for each have changed.

Membership in STX is an honor given to students enrolled in a program in technical communication, who have a cumulative grade point average of 3.5 or above, are *exemplary* in participation in STC, and demonstrate a potential for *significant* contribution to the profession.

Membership in AS is an honor given to students enrolled in a program in technical communication who have a cumulative grade point average of 3.5 or above, demonstrate *active* participation in STC, and have the potential to contribute to the profession.

Nominations are due by **1 October 2015**. Contact: Russ Hirst (*rkh@utk.edu*).

Jay R. Gould Award for Excellence in Teaching Technical Communication

The Jay R. Gould Award honors the distinguished teaching career of Professor Gould and celebrates true academic mentorship, demonstrated by the personal and professional concern that great teachers extend to their students beyond the classroom.

The Gould award nominating committee is seeking nominees for the award. To be eligible, a nominee must have been a member of STC for at least 10 years and must have been involved in postsecondary education for at least 15 years. Current STC board members and members of the Gould award nominating committee are not eligible.

Nominations are due by **1 November 2015**. Contact: Kirk St.Amant (*kirk.stamant@ecu.edu*).

Ken Rainey Award for Excellence in Research

The Ken Rainey Award honors the distinguished research contributions of Dr. Rainey, a professor at Southern Polytechnic State University and an STC Fellow who produced major research studies that continue to provide ongoing benefit to both practice and teaching in the field of technical communication.

This award honors research that has made positive, significant contributions to technical communication practice and teaching. One award will be given each year to an STC member who has conducted a lifetime of quality research in the field or has completed a single high-quality empirical study or a set of related high-quality studies.

To be eligible for the award, a nominee must have been a member of STC for at least one year.

Nominations are due by **1 November 2015**. Contact: Ann Blakeslee (*annblakeslee@msn.com*).

For more information on all of these awards and nomination forms, see *www.stc.org/membership/recognition/awards*.

As a member, you get the tools you need to be successful.

- Education and Training
- Chapters and Special Interest Groups
- Job Bank
- Annual Conference
- Award-Winning Publications
- Body of Knowledge
- Affinity Program
- Networking
- Discounts and Special Offers

www.stc.org

STC Society for Technical Communication

Standards: What's In It for Me?

BY RAY GALLON | *Senior Member*

STANDARDS—BIG YAWN, RIGHT? Let's face it, hardly any of us wants to plow through the dense text in which standards are written. If nobody reads the manual, even manual writers don't read standards, right?

Wrong.

Somewhere in your organization there is a person dedicated to "compliance," or, quite simply, you have a legal department. You likely have product managers who want to sell into countries where meeting specific standards is obligatory. If you work in a regulated industry, the regulations may point to certain standards as well.

Technical communicators are sometimes called upon to write standards, and we are not exempt from following them, either. Like it or not, it's important for us to understand how they affect us, and how we can influence their development, so that published standards adopt best practices of our discipline.

Untangling the Rat's Nest

If you read Annette Reilly's overview of standards in a previous issue of *Intercom* (*http://intercom.stc.org/2013/11/standards-101/*), you begin to get a feel for how diverse the world of standards is. Standards that affect technical communicators exist at many levels:

- Standards for technical instructions
  - Software documentation
  - Machinery documentation
  - Regulated industries documentation (health care, transport, law, accounting, etc.)
  - Military documentation
- Industry- or product-specific standards that include a section on documentation
- Documentation management and development standards
- Content management and knowledge management systems standards that include documentation
- Localization standards that include preparation of source content
- Learning and instructional content standards
- Standards governing the display of content that we produce.

This list is far from exhaustive. Standards developed by different organizations, or by different groups in the same organization, might conflict with one another.

The trick is knowing where to look for the standards that we need to know about, and having criteria for deciding which standards to apply in our situation.

Standards Are Not Laws

What if they gave a standard and nobody came?

It happens. Even publication by such erudite bodies as the International Organization for Standardization (ISO) does not guaranty adoption. Unless government regulations require adherence to a certain standard, compliance with them is voluntary.

All the same, without them, we would have no interoperability. Mobile telephones in one country would not be able to communicate with those in another. The World Wide Web could not exist. We wouldn't have email, or television, or the Olympics. A generalized standard often becomes obligatory in effect, if not in law.

We cannot know in advance if a standard will find wide adoption. We can only assess, before beginning work on a new one, what is the need and are people asking for it? In many cases, the "people" involved are industries or individual companies, many of whom want to push their own protocols or inventions forward as standards. IBM, for example, created the original DITA standard. The oManual standard was developed by *iFixit.com* and adopted by the IEEE.

This is why it is important for an organization like STC to participate in standards development, when a standard might directly influence how we do our jobs. If we want to ensure that standards for technical communication are developed by experts in the field, we need to be involved.

Aren't Standards Obsolete by the Time They're Published?

We live in a world where information changes in the time it takes to be verified. Standards development is a long, often tedious, often pedantic process. A case might be made that the whole business is obsolete.

But standards are intended to provide a baseline from which to start. Following the rules of HTML and HTTP will not guaranty you a great or successful website, only that people will be able to receive pages from your server and display them in their browser of choice.

All the major standards organizations have mechanisms that require standards to be reviewed at regular intervals, and if necessary, updated or withdrawn.

A standard is not a guide to the latest and greatest. It provides the layer of common understanding that we can have inside our own organizations, and between organizations that might be partners or competitors. It is a foundation on which to build your own methods, best practices, and innovations.

Standard Deviation is a column all about standards—a subject that affects most of our lives, but that we seldom think about. As the title implies, I want to keep the conversation lively and engaging. I'm always looking for guest columnists, and we welcome feedback with comments or requests for standards-related topics to cover. Email me at *rgallon4stc@culturecom.net.*

An Interview with Dr. Robert J. Glushko

BY SCOTT ABEL | *Senior Member*

ROBERT J. GLUSHKO is an Adjunct Full Professor in the School of Information at the University of California, Berkeley. With a PhD in cognitive psychology from University of California, San Diego as his foundation, Glushko has spent the past 30 years heavily involved in the development of innovative solutions to complex content challenges. He's worked in corporate research and development, developed a lucrative career as a successful Silicon Valley entrepreneur, and spent the last decade pushing the envelope in academia, cranking out super-savvy information technologists and content experts from one of the most prestigious universities on the planet. He's an experienced expert in both information systems and service design, a content management maven, and an innovator in the digital publishing arena. He's also co-author of *Document Engineering: Analyzing and Designing Documents for Business Informatics and Web Services*, and the principal author of *The Discipline of Organizing*, named an Information Science Book of the Year in 2014 by the Association of Information Science and Technology.

In this edition of Meet the Change Agents, Scott Abel, The Content Wrangler, interviews Glushko about the importance of thinking about organizing as a discipline and the lessons he learned from his research on the subject.

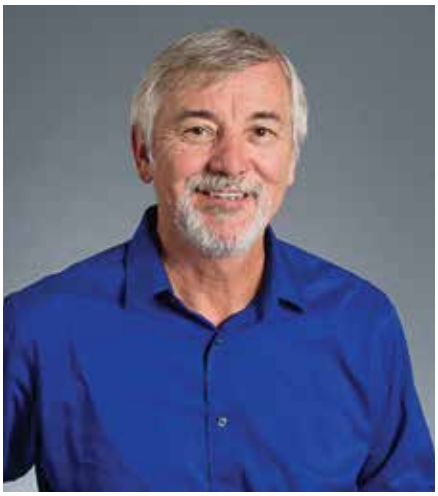
SA: You recently wrote a book called *The Discipline of Organizing*. Why did you pick the topic of organizing for the subject of your work?

RG: At Berkeley, I teach in the School of Information, and most people react to that by thinking "isn't every school a school of information?" or they otherwise express some puzzlement at the name. Many former library schools have recognized the need to broaden themselves to include business and entrepreneurial contexts of information design and use, as well as the need to embrace technology. "Information School" emerged as a brand for this new focus (see *ischools.org/*). The iSchools often define themselves as "the intersection of information, technology, and people," which is pretty unspecified. If you push for a better explanation you might get "the intersection of library science, computer science, business, user experience design, law, and other fields that care about information, technology, and people. " But that doesn't actually explain what you study if you attend an Information School.

So one day I started asking, "what exactly is at that intersection of these different disciplines?" People acted like it was a crazy question, which was probably because no one had ever asked it before, which meant it was important and not crazy to ask it. I decided that the answer was that all the disciplines in some way were about how to organize things, information or people, so their intersection was the discipline of organizing.

SA: What types of roles did you study and what were the folks in these roles in charge of organizing?

RG: Every purposeful activity involves the organization of resources and the organization of the people who create, arrange, and use them. Library and information



science has traditionally studied the organization of documents, books, and other information resources from a public sector perspective, paying careful attention to user requirements for access and preservation, and offering prescriptive methods and solutions for bibliographic description and classification. Computer science and informatics disciplines study the organization of information and computing resources in the context of information-intensive business applications. These fields emphasize process efficiency, system architecture, and implementation. Business people, especially in the context of strategy and operations, work to organize the resources in their supply and distribution channels, their information exchanges with potential and existing customers, and the people who work to plan and operate the business.

And of course, as individuals we organize our own stuff, and many of us have

In the digital age, change happens quickly. This column features interviews with the movers and shakers—the folks behind new ideas, standards, methods, products, and amazing technologies that are changing the way we live and interact in our modern world. Got questions, suggestions, or feedback? Email them to *scottabel@mac.com*.

a lot of tangible and intangible stuff to organize.

SA: What commonalities in the way people organize things did you discover amongst all the roles studied?

RG: No matter what we're organizing, there are some common activities, or a common life cycle: We select the resources to organize; we arrange them according to some set of principles, which themselves are based on properties of the resources; we design interactions with the resources that are made possible by the way we arranged them; and we maintain the resources and their arrangements over time. We do these activities informally when we're organizing something like our clothes closet or kitchen, but they are very formal and explicit when we're organizing a library, content management system, or scientific data repository.

SA: What differences did you discover in the way people organize things?

RG: It is easy to find differences, especially when you analyze how individuals organize. The goals that people have for organizing depend on how they want to interact with the resources they organize and the way they prioritize those interactions. This is easiest to see when you're organizing tangible resources like organizing your clothes closet. Some people separate their "work clothes" from their "play clothes." Some people separate their shirts from their pants, while some people arrange thing in complete outfits. Some people sort by seasons, and others by color.

There are also differences when you look at the organizing done by companies or institutions. Even though they are both organizing books, there are obvious differences when you compare the organization of libraries to bookstores, and similar contrasts can be seen when you compare museums to art galleries, scientific data repositories to business information systems, and so on. And think about how you might arrange the different categories of food in a cafeteria buffet; if you're trying to get school kids to eat healthier, you put the fat and sugar foods in hard to reach places; if you're trying to save money at an all-you-can-eat place, you put the cheap salads at the beginning and the expensive foods at the end of the line.

But more fundamental to the idea that there is a discipline of organizing, sometimes there seem to be differences when there are, in fact, similarities. Often there are different words for essentially the same activities: adding a resource to a library collection is called "acquisition," adding to a museum collection is called "accessioning," adding to an archive is "ingesting," and adding to a business information system might be called "integration." These vocabulary differences obscure the commonalities and make it hard for people to communicate across their traditional industry boundaries.

SA: You introduce the concept of an "organizing system" in the book. What are organizing systems?

RG: An organizing system is "an intentionally arranged collection of resources and the interactions they support." I hope you can see that this definition fits everything from libraries, museums, zoos, and data warehouses, to closets and kitchens … and leaves out the Grand Canyon, which exhibits a lot of arrangement in its geology, but it wasn't intentional.

SA: Some of the articles in this issue of *Intercom* focus on curation; what did you learn about curation? How do you define it and are there different types?

RG: As I mentioned earlier, different domains sometimes use the same

terms to describe activities that are more similar than you see at first glance. I see "curation" as a close neighbor to preservation, governance, and storage—all of which concern the maintenance of resources over time. So curation takes place at a personal scale when we rearrange a bookshelf to accommodate new books or create new file folders for this year's health insurance claims. It occurs at an institutional scale when a museum designs a new exhibit or a zoo creates a new habitat, and at Web scale when people select photos to upload to Flickr or Instagram, and then tag or "Like" those uploaded by others.

I've noticed that "curation" tends to be a more common term in contexts where cultural, historic, or scientific artifacts are being maintained and have some intrinsic value, as in libraries, museums, data archives or other so-called "memory institutions." In contrast, people say "governance" in contexts where the resources are maintained because they are essential in running a business, but have no intrinsic value. For example, businesses collect and preserve

An organizing system is "an intentionally arranged collection of resources and the interactions they support."

information about employees, inventory, orders, and invoices, because it ensures internal goals of efficiency, revenue generation, and competitive advantage. No one would say that some particular invoice or customer record was valuable in its own right, so they aren't "curated." Instead, we'd talk about "data governance" policies that would cover things like the collection, retention, or non-retention of personal information and business records. I've also noticed that that people who have professional training as curators really hate it when people who don't have that training use "curation" to refer to their websites, social media sharing, or personal collections of some type of thing or another.

SA: What other lessons did you learn while writing about organizing that were surprising or at least not predictable until you took a closer look?

RG: I have come to dislike the term "metadata." It is often given the useless definition of "data about data" when "data about things" is also metadata, as is "textual description about things." What is metadata for you might not be the data for me, and vice versa. My favorite example is in fantasy sports, where the "players" on fantasy teams are composed of the data produced by the actions of real players on real teams. So I talk in terms of "primary resources" and "description resources" instead of "data" and "metadata."

And something can be a resource and a description resource at the same time. Think of a concert ticket. It is package of assertions about an event—its title, time, location, cost, and so on—so it is a description resource, like a card in a library card catalog. A concert ticket is also a resource in its own right, with intrinsic value; it can be bought and sold, sometimes for a greater price than its resource description specifies. After the event, the ticket loses its intrinsic value, but might acquire extrinsic value as a different type of resource in a collection of concert tickets that reminds you of the event long afterward.

I've also been surprised and amused to see how often people in ordinary language muddle the distinction between a thing—an instance of some resource—and the class of resources to which it belongs. People say that two things are the same when what they really mean is that they are instances of the same class of things. I like to ask students if they've ever seen "Shamu" at Sea World because most of them have. Then I ask them when and at which Sea World, because there are several of them. They laugh when they get it that "Shamu" is a brand name given to the star Orca at each Sea World park, and when they recall that it was back in 1999 that they saw him, they realize that that particular Shamu is certainly not the same one performing today.

SA: Talk to us about the book and tell us what makes *The Discipline of Organizing* more than just a book?

RG: A book with the ambitious goal of defining a new discipline must be broad enough to include all the disciplines that contribute to the "transdiscipline" that emerges at their intersection. But it must treat each contributing discipline with enough depth so that the new concepts of the emergent discipline can be re-applied meaningfully to discipline-specific concepts and examples. These two requirements to make the book both broad and deep would have made it bloated and hard to understand as a textbook, if we hadn't come up with some innovations in book design and implementation.

So we wrote the book with a core text that is supplemented by about 600 notes, typically a paragraph in length, each of which is identified by discipline. In addition, we label about 15% of the chapter content, especially examples and sidebars, as being focused on disciplinary-specific rather than transdisciplinary content. This content model turns the source files for our book into a "family of books" whose common core is extended by discipline-specific content. We then can build any particular book by filtering the content based on the values of the disciplinary attributes in our source files.

If that isn't clear, consider how a single automobile production line can support the assembly of thousands of customized variations of a car model. What we've done is to develop analogous "production-line" techniques for single-source publishing.

This novel book architecture has made it possible for the book to serve as a primary or supplemental text in more than 50 courses in 18 countries in information organization, knowledge management, digital collections, information architecture, information systems design, and other fields that differentially emphasize the contributing disciplines around the core idea of organizing resources. The book was chosen as an Information Science Book of the Year in 2014—in part because of its combination of intellectual and design innovations.

SA: Thanks for sharing your expertise with our readers. I really appreciate you taking time out of your busy schedule to help us understand the discipline of organizing.

RG: You're welcome, Scott. Thanks for inviting me to participate and to share what I've learned. I hope the audience finds value in this interview.

SA: Where can folks learn more about your work and read the book online?

RG: At *http://disciplineoforganizing.org*, you can learn more about the book, and you can freely download six chapters from the first edition (2013). You can also read about the enhanced eBook editions we published last year. We can't give those away yet, but they're inexpensive and you can better appreciate the idea of a core text enhanced by disciplinary-specific content with the eBooks.

Reimagining Audience in the Twitter Era

BY ADAM FOUT | *Student Member*

AS TECHNICAL COMMUNICATORS, we are always trying to anticipate user needs. Twitter is a perfect tool for understanding users because it provides insights into our audience's actual needs. We no longer have to speculate where users are encountering problems—they're tweeting specific errors in real time, often with pictures of the error message (see Figure 1). This article provides technical communicators with a framework for identifying user feedback from Twitter and incorporating that feedback into technical documentation.

Why Twitter Is Valuable to Technical Communicators

A growing number of individuals are using Twitter for technical support. According to one BBC article, "36% [of respondents] had used a social media platform to contact a big company" (Akwagyiram 2012). But the reach of Twitter can't really be overstated, and many tweets can be collected and analyzed after months or even years. The volume of tweets generated can be surprising.

According to Twitter, as of January 2015, the social media platform has over 288 million monthly active users, with over 500 million tweets being sent per day (*about.twitter.com*). Some of these Twitter communities are enormous; for instance, Samsung Mobile has over 10 million followers (*twittercounter.com*). Similarly, Android has over 7 million Twitter followers. As a result, most tech companies have dedicated Twitter handles for tech support (e.g., @BlackBerryHelp or @CoxHelp), and these channels can also provide a potential data source of user issues. That is, companies can use consumer tweets as a source of information on how to improve their products or services (especially the usability of their products and services). Technical communicators can use such tweets to readily identify the user issues they need to address when revising documentation.

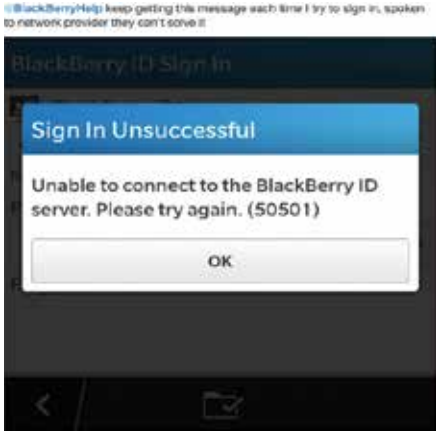


Figure 1. Example of a user tweeting a specific error message

How Using Twitter Data Benefits Technical Communicators

From a technical communication perspective, the most important aspect of Twitter is that Twitter data reveals the most current technical problems in real time. This feature lends itself perfectly to agile development, in which software is developed through multiple iterations. (Such processes are regularly and often used in software development circles.) Using this Twitter data, technical communicators can quickly address specific documentation problems noted in the Twitter feeds of clients. For example, online help can be edited on the fly to address an unknown issue, a technical illustration can be revised when its shortcomings are made known, and an error message can be updated when client tweets state that its wording is confusing.

Twitter can even reveal vital characteristics of users. For instance, a technical communicator may be able to spot a pattern of errors that speaks to the prior knowledge of a particular user base. (For example, sometimes technical communicators assume users know how a certain piece of software works, but the users reveal that they are unfamiliar with the software.) Additionally, Twitter can provide specific user data—such as gender, age, and sometimes location—that can be of value for marketing communications that need to target a specific group of users. Analyzing the time of day a tweet is sent out may also reveal information about whether 9–5 workers or nontraditional workers are using certain documentation and under what conditions.

How Twitter Data Can Be Collected and Analyzed for Trends

While reading through individual tweets may be beneficial, it is difficult to synthesize meaningful patterns from such a small sample. Instead, automating the collection of a large volume of tweets is more practical. And a range of related technologies—both for free and for fee—is available online.

For example, technical communicators can create their own database of user tweets with free Web apps such as

This column features the work of individuals currently enrolled in or recently graduated from educational programs in the field. Contributors examine how theories and concepts encountered in their classes can be applied to technical communication practices. To submit a column, email the editor at *STAMANTK@ecu.edu.*

TAGS (*https://tags.hawksey.info*). This application allows technical communicators to download thousands of tweets from a given week to a Google spreadsheet. (This information can include tweets with a hashtag or from a specific handle.) Technical communicators can also set TAGS to collect tweets on a timer, allowing a mass number of tweets sent over multiple days, weeks, or months to be collected.

Once a large number of tweets have been collected, they can be analyzed using free concordance software like AntConc (*laurenceanthony.net/software/antconc*). This kind of analysis can reveal patterns, such as a pattern of multiple users consistently encountering the same error, implying a technical or documentation issue. Finally, after the tweets have been copied and pasted from TAGS (or from *topsy.com*) into a blank .txt document, the .txt document can be uploaded to AntConc for analysis.

How Technical Communicators Can Use Concordance Software

Two major functions of concordance software will be particularly useful to technical communicators when analyzing their .txt document with concordance software.

1. Frequency sorting—sorting a list of words by how often each word occurs in a given dataset
2. Concordancing—viewing a word in each instance in which it occurs along with the words that appear to the immediate left and right (Rayson 2002).

Both of these methods of sorting and analyzing data require a large dataset, so collecting at least several hundred tweets, especially over time, will be crucial to success.

Once collected, these tweets can be sorted for frequency using the "Word List" function in AntConc. The resultant list will show precisely how many times each word in the database occurs, indicating if a term is used by many users or by only a few. High-frequency words associated with a product should then be investigated in order to determine if many different users are experiencing similar issues, which can then be addressed in documentation.

A word that appears to be significant (i.e., it appears frequently across tweets) can be investigated with the concordance function, which will show the context in which the term appears. Concordancing is especially valuable because it allows technical communicators to sort data by surrounding words to determine if certain phrases (vs. just specific words) are being used and reused in tweets (Rayson 2002).

More advanced analyses of tweets using statistical methodologies allow one to identify statistically significant collocates for particular words or phrases. These analyses can help identify the main issues that users are having with a product so that these issues can be addressed.

How to Respond to Trends in Twitter Data

If a technical communicator wants to determine whether a similar error is repeatedly noted in client tweets, he or she can search for tweets that make mention of a unique word in the error message. In such cases, it may also be valuable for the technical communicator to read every instance of each tweet to gain a more intuitive understanding of the user base.

Once a pattern of users experiencing the same error has been identified, our technical communicator could even use Twitter to query users for details about the specifics of the error being discussed. The knowledge garnered from the data could also be used to alter a company's online help docs or FAQ's to address an issue if it continually appears. Moreover, once the changes to documentation have been made, they can be announced directly to a company's audience on Twitter.

How Twitter Gives Technical Communicators the Power to Know Their Audience

Without doing extensive research, technical communicators usually aren't able to learn much about whom their audience is or the problems with which their audience struggles. Twitter, however, can change that. Using Twitter, along with a little help from a few different tools, technical communicators can quickly and effectively learn about their audiences. By using Twitter strategically, technical communicators can better tailor their technical documentation and online help to meet audience needs and expectations. 1

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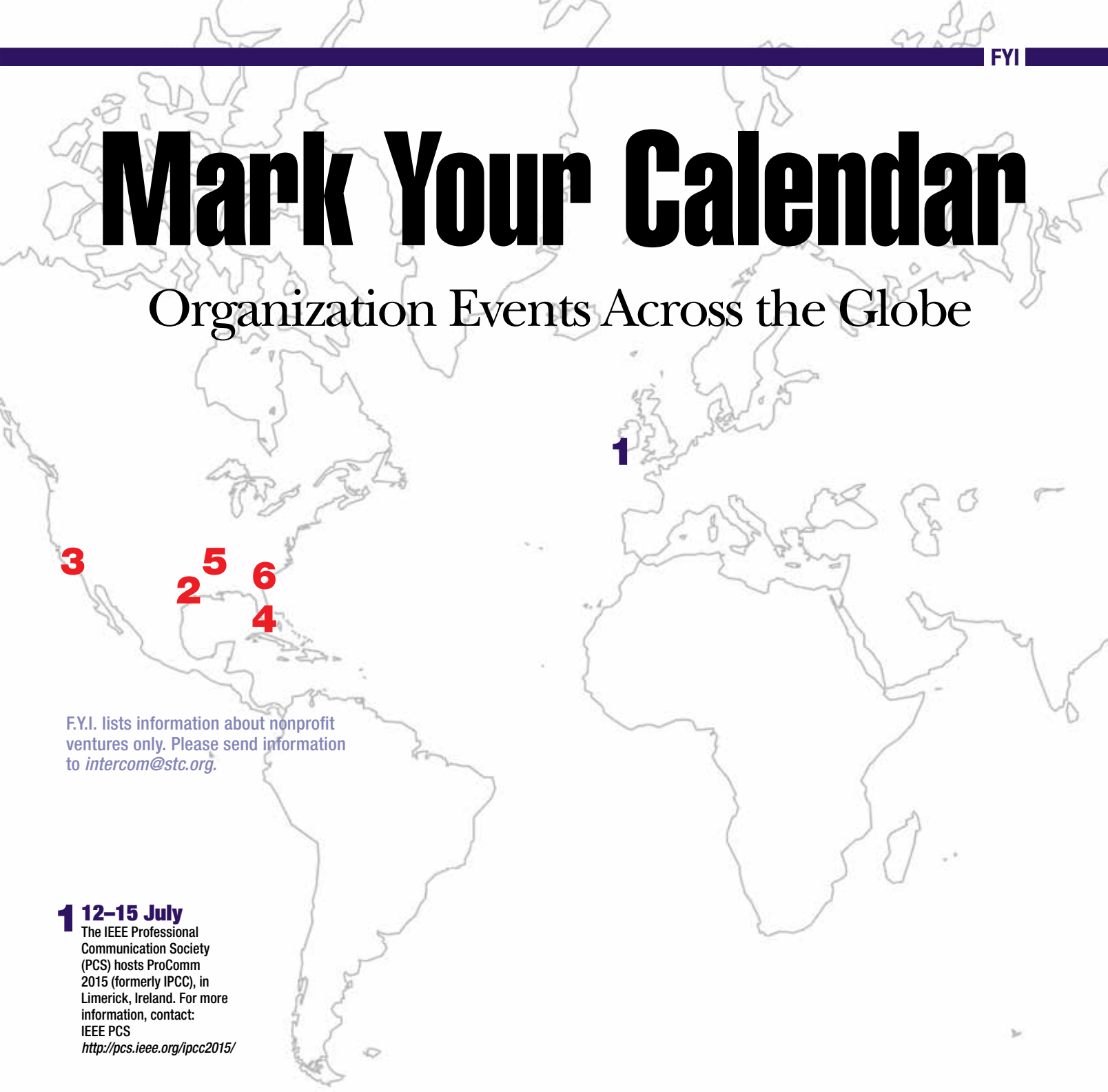

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1 12–15 July
The IEEE Professional Communication Society (PCS) hosts ProComm 2015 (formerly IPCC), in Limerick, Ireland. For more information, contact:
IEEE PCS
http://pcs.ieee.org/ipcc2015/

2 30 Sept–3 Oct
The American Medical Writers Association (AMWA) will hold its 75th annual conference, with a theme of "Quest Toward Brilliance," at the Grand Hyatt San Antonio in San Antonia, TX. For more information, contact:
AMWA
+1 (301) 294-5303
amwa@amwa.org
www.amwa.org/events_annual_conference

3 26–30 Oct
The Human Factors and Ergonomics Society (HFES) will hold its 2015 international annual meeting at the JW Marriott in Los Angeles, CA. For more information, contact:
HFES
+1 (310) 394-1811
info@hfes.org
www.hfes.org/web/HFESMeetings/2015annual-meeting.html

4 4-7 Nov
The American Translators Association (ATA) will hold its 56th annual conference at the Hyatt Regency Miami in Miami, FL. For more information, contact:
ATA
+1 (703) 683-6100
ata@atanet.org
www.atanet.org/conf/2015

5 6-10 Nov
The American Society for Information Science and Technology (ASIS&T) will hold its Annual Meeting in St. Louis, MO. For more information, contact:
ASIS&T
asis@asis.org
https://www.asist.org/events/annual-meeting

6 8-10 Nov
The Public Relations Society of America (PRSA) hosts their international conference in Atlanta, GA. For more information, contact:
PRSA
+1 (800) 350-0111
www.prsa.org/Conferences/InternationalConference/

* STC-related event

The Thrill of the Hunt

BY CINDY CURRIE | *Fellow*

The author letterboxing at the STC Summit in Ohio

WHEN I LEFT the STC Board in 2012, I was looking for something new to do in my newfound spare time. My sister introduced me to a hobby I am now quite passionate about—letterboxing. Letterboxing combines artistic ability with treasure hunts in parks, cemeteries, historic sites, hiking trails, businesses, and other places where they can be hidden, and you'd be very surprised at where people find to hide them!

Each letterboxer has a trail name (mine is "girlinthemoon"), a signature stamp that represents their trail name, and a logbook. Based on clues that are located online at *www.atlasquest.com*, I search for letterboxes at locations that are either provided in the clues or surmised based on the clues. When I find a letterbox, the "treasure" is always a rubber stamp, typically hand-carved (the artistic part) and a logbook. I use the rubber stamp in the letterbox to stamp my logbook, recording the date, location, and trail name of the letterboxer who "planted" the box. Next, I stamp my signature stamp in the logbook that's in the letterbox and record the date, usually adding comments about the stamp or location. Then I repackage and rehide the letterbox carefully so that the next letterboxer who comes along can find it. Finally, I log my "finds" on the Atlas Quest website. As of this writing, I have 774 finds (in a little over three years)! Yes, the thrill of the hunt runs deeply through my veins, as does a love of the outdoors and history!

Letterbox trading cards (LTCs) are standard-size trading cards (2½" x 3½"), like baseball cards. To participate, you sign up through a tracker. Each participant creates a card with the image of a handcarved stamp on the front of the card and any other embellishments as may be appropriate for the theme. Card stock, color, layering of stock and paper, pictures, and so on can be included. It's a complete design exercise to create an LTC. The back of an LTC contains the name of the tracker, a unique ID number (helpful for logging the LTC online), the trail name and signature stamp of the creator, and typically some information about the subject of the card. I'm currently participating in an LTC series called Decades of the 19th Century in America. There are ten LTCs in the series, with approximately eight participants per tracker. Each participant is creating an LTC about some aspect of American history that occurred during each decade of the 19th century, one decade a month, for ten months. By the end, each participant will have approximately 80 LTCs and will have learned quite a bit about 19th century American history.

During the recent Technical Communication Summit in Columbus, OH, I planned some time for letterboxing. There was an indoor letterbox in the gift shop at the Ohio State Capitol building, not far from the Hyatt. To get this letterbox, I needed to give a seven-word passphrase to the store clerk. To find the passphrase, I had to visit several other sites in the greater Columbus area. The first stop was the site of the former Camp Chase, which was a Union prison camp for Confederate soldiers during the Civil War. The site is now a Confederate cemetery with 2,260 graves—an unexpectedly moving experience for me. I had to find the last names of two soldiers and was given the grave numbers to do so. (This is one of the beautiful things about letterboxing. I visit so many interesting and unknown historic places.)

With the soldiers' names in hand, I continued on my quest. My next stop was the Heritage Bike Trail in downtown Old Hilliard. I needed the 30th word from one of the plaques on a memorial there. With three of the seven words of the passphrase now obtained, I headed for the State House. It was raining heavily that day, so I decided to stop in at the gift shop to be sure the letterbox was still there before romping around the State House grounds to get the remaining four words of the passphrase. The store clerk had the box and decided to give me a "rain pass," as she called it, asking only for three words of the passphrase. What a treasure trove! This letterbox contained seven beautifully hand-carved stamps! And, as a bonus, there were old U.S. postage stamps to take as a prize for obtaining the letterbox!

You're probably wondering what the significance of these sites are. The name of the Columbus letterbox is "A Journey with Abraham Lincoln." You already get how the Confederate cemetery fits in here. The Heritage Bike Trail was built over old railroad tracks, the same tracks on which "The Lincoln Special" had traveled—the train that carried President Lincoln's body back to Springfield, IL, for burial. Lincoln's body lay in state in the rotunda of the Ohio State House for ten hours on 29 April 1865, with more than 55,000 people passing through to pay their respects.

While in Columbus, letterboxing also took me to James Thurber's house (there's a box in the garden beside the house), the Old Deaf School Park where there is a topiary landscape of a Seurat painting of a landscape (the letterbox is in the gift shop), and the Greenlawn Cemetery where there are 27 letterboxes. I opted only to find the Angry Birds series of ten letterboxes. That brought my Columbus total to 21 finds!

And, yes, I'll be letterboxing in Anaheim, CA, next May. Care to join me?

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